Candidate Guidance and Portfolio for the SVQ Business and Administration SCQF level 6

Award code: GT9H 23

Candidate name:

Publication code: Z0398

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:

Units and elements	**Units** define the broad functions carried out in your particular job and are made up of a number of **elements**. Each **element** describes a specific work activity which you have to perform and may relate to skills or to the demonstration of Knowledge and Understanding.
Performance criteria	The level and quality of how you should carry out these activities is determined by a number of statements called **performance criteria**. **Performance criteria** are used to judge your competence.
Range / Scope statements	A **range statement** 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. **Range Statements** are also called **scope** in some National Occupational Standards.
Evidence requirements	The **evidence requirements** 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.
Knowledge and understanding	The section on **knowledge and understanding** 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

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

You must ensure that yo

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.

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

* 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

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

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:

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

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.

Section	Completed	Page / Section number
Title page for the portfolio		
Personal profile		
Your own personal details		
A brief CV or career profile		
A description of your job		
Information about your employer / training provider / college		
Unit assessment plans		
Unit progress record		
Completed element achievement records for each unit		
Signed by yourself, your assessor and the internal verifier (where relevant)		
Evidence reference numbers included		
Index of evidence (with cross-referencing information completed)		
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 [Circle the reference numbers as you complete each unit. You can then easily see what stage you have reached in your SVQ.] tory Units and **optional** Units.

Unit checklist — circle the reference numbe[...] it.

| Mandatory | 206 | 301 | 302 | 303 | 308 | | | | |
| Optional | 305 | 306 | 311 | 312 | | | | | |

Mandatory Units

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

[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.

Candidate's signature		Date	
Assessor's signature		Date	
Internal verifier's signature		Date	

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	Statement that I know and understand customer requirements. Names of customer and software and hardware requirements in portfolio. 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.	**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: **materials** (consumables, removable storage media), **regulations** (current legislation, manufacturer's instructions, organisational procedures), **system** (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

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

Unit	301 Select and enable IT for use
Element(s)	1
Evidence index number	**5**

Circumstances of assessment
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.

List of questions and candidate's responses	
Q	If a member of staff asked you for a particular piece of equipment, what procedures would you follow?
A	*I would ensure that a hardware requisition form has been filled out with the rational 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.*
Q	You discover that a member of staff has installed a piece of software on their workstation PC. What do you do?
A	*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.*
Q	
A	

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 uUnit numbers are used in all your recording documentation and when your results are communicated to SQA. SSC identification codes are **not valid** in these instances.

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

Mandatory								
Optional								

Mandatory units

Group A — Mandatory units

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
J6WV 04	6	5	S301	Develop Self and Improve Own Performance in a Business Environment
J6WW 04	6	7	S302	Undertake and Support Work Practices in a Business Environment
J6WX 04	6	3	S308	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
J6X0 04	6	4	S311	Design and Produce Documents in a Business Environmenta
FE03 04	6	4	S303	Solve Business Problems
J6X4 04	6	6	S304	Collaborate and Provide Support in a Business Environment
FE05 04	6	3	S305	Contribute to Decision-Making in a Business Environment
FE06 04	7	5	S306	Contribute to Negotiations in a Business Environment
J6WT 04	6	6	S324	Support Organisational Projects
FE0F 04	6	7	S315	Support the Design and Development of Information Systemsb
H98C 04	8	7	S413	Design and Develop an Information Systemb
FD9A 04	7	7	S226	Support the Management and Development of an Information Systemc
FE1M 04	8	6	S414	Manage and Evaluate Information Systemsc
FE0T 04	6	8	S319	Organise and Co-ordinate Events
FE0V 04	6	5	S320	Plan and Organise Meetings
FE0G 04	6	7	S316	Monitor Information Systems
FE0H 04	6	6	S317	Analyse and Report Data
HK2A 04	9	15	S420	Plan change
H98D 04	8	6	S419	Explore Ideas for Innovation in a Business Environment
J6X1 04	6	4	S323	Contribute to Innovation in a Business Environment
FE0W 04	6	4	S321	Organise Business Travel or Accommodation
J6X2 04	6	3	S325	Deliver and Evaluate Customer Service
FE0D 04	6	3	S309	Develop a Presentation
FE0E 04	6	3	S310	Deliver a Presentation
FE0M 04	6	8	S329	Provide Administrative Support in Schools
FE08 04	6	5	S322	Supervise an Office Facility
FE0J 04	7	5	S318	Order Products and Services
FN75 04	7	6	S351	Verify Critical Dates for Sentences
FN76 04	6	6	S352	Verify the Release Process
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
H68K 04	7	11	S416	Manage Budgets
FD9K 04	7	8	S247	Control Payroll
FD9L 04	8	3	S248	Account for Income and Expenditure

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
FD9M 04	8	3	S249	Draft Financial Statements
FD8V 04	6	8	S215	Calculate Pay

Restricted subgroup 0–1

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
FD9W 04	6	4	S212	Prepare Text from Notes
FE11 04	6	4	S312	Prepare Text from Notes Using Touch Typing (60 wpm)
FE10 04	6	4	S314	Prepare Text from Recorded Audio Instruction (60 wpm)
FE0Y 04	6	8	S313	Prepare Text from Shorthand (80 wpm)

Group C — Optional units 0–2

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
J6XA 04	5	4	S211b	Produce and Process Documentsa
H559 04	5	3	S218	Store and Retrieve Information Using a Filing System
F93X 04	5	3	S210	Provide Reception Services
FD96 04	5	3	S250	Meet and Welcome Visitors
FD93 04	5	4	S208	Take Minutes
J6WS 04	5	3	S112	Use Office Equipment in Accordance with Occupational Regulations and Safety Guidelines
FD9F 04	5	3	S225	Respond to Change in a Business Environment
FD98 04	5	4	S217	Research Information
H984 04	5	3	S216	Collate and Organise Data
H985 04	5	3	S221	Maintain and Issue Stock Items
FD94 04	5	3	S209	Handle Mail
H983 04	5	1	S206	Use Voicemail Message Systems
FD92 04	5	3	S207	Use a Diary System
FD9H 04	5	4	S228	Administer the Recruitment and Selection Process
H987 04	5	6	S3071	Allocate Work to Team Members
H988 04	5	6	S3072	Quality Assure Work in Your Team
FN6X 04	5	6	S255	Calculate Critical Dates for Sentences
FN6Y 04	5	6	S256	Make Administrative Arrangements for the Movement of Individuals Outside the Custodial Establishment

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
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
FD9G 04	5	3	S227	Administer HR Records

Restricted subgroup 0–1

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
FD9X 04	5	3	S213	Prepare Text from Notes Using Touch Typing (40 Wpm)
FD9V 04	5	4	S215	Prepare Text from Recorded Audio Instruction (40 Wpm)
FD9T 04	5	8	S214	Prepare Text from Shorthand (60 wpm)

SCQF level 5 units 0–1

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
F9AP 04	5	3	S236a	Bespoke Software 2d
F9AV 04	5	3	S236b	Specialist Software 2d
F9C2 04	5	3	S237	Data Management Software 2e
F9C5 04	5	4	S238	Database Software 2f
F99F 04	5	4	S239	Improving Productivity Using IT 2g
F99T 04	5	2	S240	IT Security for Users 2h
F9CT 04	5	4	S241	Presentation Software 2i
F99K 04	5	4	S242	Setting up an IT System 2j
F9D1 04	5	4	S243	Spreadsheet Software 2k
F9A7 04	5	4	S244	Using Collaborative Technologies 2l
F9D4 04	5	4	S245	Website Software 2m
F9D7 04	5	4	S246	Word Processing Software 2n
F9A4 04	5	3	S252	Using Email 2o

SCQF level 6 units 0–1

SQA ref	SCQF level	SCQF credit points	SSC ref	Title
F9AR 04	6	4	S339a	Bespoke Software 3d
F9AW 04	6	4	S339b	Specialist Software 3d
F9C3 04	6	4	S340	Data Management Software 3e
F9C6 04	6	6	S341	Database Software 3f
F99F 04	6	5	S342	Improving Productivity Using IT 3g
F99V 04	6	3	S343	IT Security for Users 3h
F9CV 04	6	6	S344	Presentation Software 3i
F99L 04	6	5	S345	Setting up an IT System 3j
F9D2 04	6	4	S346	Spreadsheet Software 3k
F9A8 04	6	6	S347	Using Collaborative Technologies 3l
F9D5 04	6	5	S348	Website Software 3m
F9D8 04	6	6	S349	Word Processing Software 3n
F9A5 04	6	3	S350	Using Email 3o
J6X3 04	6	6	S360	Develop Skills and Competencies about Social Media Channels and Digital Platforms

Restricted combinations:

Either INSBA013 Design and produce documents in a business environmenta from Group B or INSHOU01 Produce and process documentsa from Group C, but not both.

Group B all units SCQF level 6 or above:
Either CFABAD111 Support the design and development of information systemsb or CFABAD112 Design and develop an information systemb, but not both.
Either CFABAD121 Support the management and development of an information systemc or CFABAD122 Manage and evaluate information systemsc, but not both.
Restricted sub-group: ONE unit can be selected

Optional Group C: SCQF 5 and IT units select 0–2 units.
Restricted sub-group: ONE unit can be selected
IT units must be selected either from level 5 or level 6 groupings:

Either Bespoke software 2d or Specialist software 3d, but not both.
Either Bespoke software 2d or Specialist software 3d, but not both.
Either Data management software 2e or Database management software 3e.
Either Database software 2f or Database software 3f, but not both.
Either Improving productivity using IT 2g or Improving productivity using IT 3g, but not both.
Either IT security for users 2h or IT security for users 3h, but not both.
Either Presentation software 2i or Presentation software 3i, but not both.
Either Setting up an IT system 2j or Set up an IT system 3j, but not both.
Either Spreadsheet software 2k or Spreadsheet software 3k, but not both.
Either Using collaborative technologies 2l or Using collaborative technologies 3l, but not both.
Either Website software 2m or Website software 3m, but not both.
Either Word processing software 2n or Word processing software 3n, but not both.
Either Using email 2o or Using email 3o, but not both.

Glossary of terms

Advisor
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.

Assessment
The process of generating and collecting evidence of a candidate's performance and judging that evidence against defined criteria.

Authentication
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.

Candidate
The person enrolling for an SQA qualification.

Centre
The college, training organisation or workplace where SQA qualifications are delivered and assessed.

Element of competence
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).

Evidence
Materials the candidate has to provide as proof of his or her competence against specified performance criteria.

Evidence requirements
Specify the evidence that must be gathered to show that the candidate has met the standards laid down in the performance criteria.

External verifier
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.

Instrument of assessment
A means of generating evidence of the candidate's performance.

Internal verifier
The person appointed from within the centre who ensures that assessors apply the standards uniformly and consistently.

Observation
A means of assessment in which the candidate is observed carrying out tasks that reflect the performance criteria given in outcomes.

Outcome   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).

Performance criteria   Statements which describe the standard to which candidates must perform the activities which are stated in the outcome.

Portfolio   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.

Product evaluation   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.

Range / Scope   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 6

UNIT J6WV 04 (S301)   Develop Self and Improve Own Performance in a Business Environment

Unit summary

This standard is about developing self and improving own performance in a business environment. The standard covers planning the improvements, accepting plans and responsibility for own work and its delivery. It includes negotiating the work targets and resources required for meeting them, reflecting on and learning from any mistakes, setting targets for own performance and demonstrating commitment to meet them. Developing self is an important aspect of your performance as it addresses emotional intelligence, your wellbeing, mental health, balance between personal and professional life not only in an officebased environment, but working remotely, or from home.

This standard is built around three main areas:

1   Plan and be accountable for own work
2   Support the working practices
3   Develop self.

It is for professionals in business administration roles who develop selves and improve own performance in a business environment.

Skills

You will apply the following skills:

♦   Analysing.
♦   Communicating.
♦   Collating feedback.
♦   Decision-making.
♦   Organising.
♦   Planning.
♦   Presenting information.
♦   Researching.
♦   Problem solving.
♦   Using technology.

UNIT J6WV 04 (S301)   Develop Self and Improve Own Performance in a Business Environment

Performance criteria

You must be able to:

Plan and be accountable for own work
1   Identify and agree the performance targets and the timescales for achievement.
2   Plan how to make best use of time and identify the required resources.
3   Confirm the working methods and practices with your line management.
4   Keep your line management informed about the progress of your performance.
5   Follow the agreed procedures for dealing with problems or issues.
6   Take responsibility for your own work and accept responsibility for any mistakes made.
7   Seek support and assistance from your colleagues or team members where required.
8   Meet deadlines your or renegotiate targets and plans.
9   Reflect on your performance and review it in accordance with lessons learnt.
10   Follow agreed guidelines, procedures and, where appropriate, codes of practice.

Support the working practices
11   Set the targets for own performance and demonstrate commitment to meet them.
12   Cope with pressure and overcome difficulties and setbacks.
13   Seek new challenges and take the initiative on them.
14   Adapt to change and support colleagues and team members during the process.
15   Treat colleagues and team members with honesty, respect and consideration.
16   Support colleagues and team members with work tasks.

Develop self
17   Seek the feedback from your colleagues and team members.
18   Collate the feedback received for evaluation of your own work.
19   Identify methods to improve your work, and test their effectiveness with working practice.
20   Update your plans for learning and improvement.
21   Review your progress with line management on a regular basis.
22   Identify your learning and development needs for your performance improvement.
23   Develop and follow a learning plan that meets your needs.
24   Review your performance through self-reflection when working towards achievement of your objectives.
25   Use emotional intelligence to recognise and evaluate your own and your colleagues' strengths and weaknesses, feelings, opinions and judgements.
26   Seek new sources of support and feedback, when necessary.
27   Take actions to maintain your well-being, mental health, balance between your professional and personal life, when required.

UNIT J6WV 04 (S301)   Develop Self and Improve Own Performance in a Business Environment

Knowledge

You need to know and understand:

Plan and be accountable for own work
1   How to identify and agree the performance targets and the timescales for achievement.
2   The planning and time management techniques.
3   The scope of resources required meeting the performance targets.
4   The working methods and practices within your role.
5   How to keep track of the progress of your performance and why it is important to keep your line manager up-to-date on this.
6   The agreed procedures for dealing with problems or issues.
7   The importance of taking responsibility for any mistakes.
8   How to seek support and assistance from your colleagues or team members.
9   The relevant guidelines, procedures and codes of practice that are relevant to your work.
10   The benefits and value of continuously improving your work.

Support the working practices
11   The targets of own performance and the importance of meeting them.
12   The purpose and value of being resilient when you experience pressure, difficulties and setbacks.
13   The purpose and benefits of being assertive.
14   The purpose and benefits of actively seeking new challenges and adapting to change.
15   How to offer support to your colleagues and team members.
16   The types of behaviour that show you are honest, respectful and considerate.

Develop self
17   How to seek feedback from your colleagues and team members.
18   The methods of collating the feedback to evaluate your work.
19   The purpose and benefits of testing possible improvements to your work.
20   How learning and development can help you to improve your work, benefit the organisation and further your career.
21   How to develop a learning plan.
22   Why it is important to review your progress with line management on a regular basis.
23   The main career progression routes available to you.
24   The self-reflection techniques for monitoring your performance.
25   The importance of emotional intelligence.
26   The sources of support and feedback, where required.
27   Your well-being, mental health, balance between your professional and personal life.

UNIT J6WV 04 (S301)   Develop Self and Improve Own Performance in a Business Environment

Record of evidence

Performance indicators	Evidence numbers	Evidence type
Plan and be accountable for own work		
1 Identify and agree the performance targets and the timescales for achievement.		
2 Plan how to make best use of time and identify the required resources.		
3 Confirm the working methods and practices with your line management.		
4 Keep your line management informed about the progress of your performance.		
5 Follow the agreed procedures for dealing with problems or issues.		
6 Take responsibility for your own work and accept responsibility for any mistakes made.		
7 Seek support and assistance from your colleagues or team members where required.		
8 Meet deadlines your or renegotiate targets and plans.		
9 Reflect on your performance and review it in accordance with lessons learnt.		
10 Follow agreed guidelines, procedures and, where appropriate, codes of practice.		
Support the working practices		
11 Set the targets for own performance and the importance of meeting them.		
12 Cope with pressure and overcome difficulties and setbacks.		
13 Seek new challenges and take the initiative on them.		
14 Adapt to change and support colleagues and team members during the process.		
15 Treat colleagues and team members with honesty, respect and consideration.		
16 Support colleagues and team members with work tasks.		
Develop self		
17 Seek the feedback from your colleagues and team members.		
18 Collate the feedback received for evaluation of your own work.		
19 Identify methods to improve your work, and test their effectiveness with working practice.		
20 Update your plans for learning and improvement.		

UNIT J6WV 04 (S301)   Develop Self and Improve Own Performance in a Business Environment

Performance indicators	Evidence numbers	Evidence type
21 Review your progress with line management on a regular basis.		
22 Identify your learning and development needs for your performance improvement.		
23 Develop and follow a learning plan that meets your needs.		
24 Review your performance through self-reflection when working towards achievement of your objectives.		
25 Use emotional intelligence to recognise and evaluate your own and your colleagues' strengths and weaknesses, feelings, opinions and judgements.		
26 Seek new sources of support and feedback, when necessary.		
27 Take actions to maintain your well-being, mental health, balance between your professional and personal life, when required.		

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

UNIT J6WV 04 (S301)   Develop Self and Improve Own Performance in a Business Environment

Knowledge requirements	Evidence numbers	Evidence type
Plan and be accountable for own work		
1 How to identify and agree the performance targets and the timescales for achievement.		
2 The planning and time management techniques.		
3 The scope of resources required meeting the performance targets.		
4 The working methods and practices within your role.		
5 How to keep track of the progress of your performance and why it is important to keep your line manager up-to-date on this.		
6 The agreed procedures for dealing with problems or issues.		
7 The importance of taking responsibility for any mistakes.		
8 How to seek support and assistance from your colleagues or team members.		
9 The relevant guidelines, procedures and codes of practice that are relevant to your work.		
10 The benefits and value of continuously improving your work.		
Support the working practices		
11 The targets of own performance and the importance of meeting them		
12 he purpose and value of being resilient when you experience pressure, difficulties and setbacks		
13 The purpose and benefits of being assertive.		
14 The purpose and benefits of actively seeking new challenges and adapting to change.		
15 How to offer support to your colleagues and team members.		
16 The types of behaviour that show you are honest, respectful and considerate.		
Develop self		
17 How to seek feedback from your colleagues and team members.		
18 The methods of collating the feedback to evaluate your work.		
19 The purpose and benefits of testing possible improvements to your work.		

UNIT J6WV 04 (S301)   Develop Self and Improve Own Performance in a Business Environment

Knowledge requirements	Evidence numbers	Evidence type
20 How learning and development can help you to improve your work, benefit the organisation and further your career.		
20 How learning and development can help you to improve your work, benefit the organisation and further your career.		
21 How to develop a learning plan.		
22 Why it is important to review your progress with line management on a regular basis.		
23 The main career progression routes available to you.		
24 The self-reflection techniques for monitoring your performance.		
25 The importance of emotional intelligence.		
26 The sources of support and feedback, where required.		
27 Your well-being, mental health, balance between your professional and personal life.		

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 J6WW 04 (S302) Undertake and Support Work Practices in a Business Environment

Unit summary

This standard is about undertaking supporting work practices in a business environment. It includes supporting your organisation's purpose and values, assessing and managing risks, maintaining the security and confidentiality, also supporting diversity and sustainability.

It is for business administration professionals in supervisory or managerial roles who have responsibility for undertaking and supporting work practices in a business environment.

Skills

You will apply the following skills:

♦ Communicating.
♦ Interpersonal skills.
♦ Monitoring.
♦ Planning.
♦ Problem solving.
♦ Reading.
♦ Team working.
♦ Working with other members of staff.

UNIT J6WW 04 (S302)   Undertake and Support Work Practices in a Business Environment

Performance criteria

You must be able to:

Support your organisation's purpose and values
1   Support your organisation's overall mission and team's objectives.
2   Identify your organisation's purpose, policies, procedures and values.
3   Put your organisation's values into practice in all aspects of your work.
4   Work with external organisations and stakeholders in a way that improves the image of your organisation.
5   Improve your working practices in accordance with organisation's objectives, policies, systems, procedures and values.

Assess and manage risks
6   Identify possible sources of risk.
7   Assess the levels of risks.
8   Monitor and mitigate risks.
9   Identify any potential risks and manage these when they occur.
10   Evaluate and your methods of assessing and managing risks.

Maintain security and confidentiality
11   Maintain the security and confidentiality of information in accordance with organisational procedures and current legislation about data protection and use of technologies.
12   Report any concerns about security and confidentiality to the relevant member of staff or agency.

Support diversity
13   Establish and maintain a working environment that values diversity and respects all members of staff within your organisation.
14   Work with colleagues and use their experience to improve your working practices and methods of communication.
15   Interact with colleagues in a professional manner that respects their background, abilities, values, customs and beliefs.
16   Uphold the rights of members of staff who are different from you.
17   Follow your organisation's procedures and legal requirements in relation to equality legislation.

Support sustainability
18   Establish and maintain procedures for waste management.
19   Keep waste to a minimum and follow procedures for the recycling and disposal of waste materials.
20   Follow relevant procedures for maintenance of equipment.
21   Continuously review working methods, including use of technology, and ways of improving efficiency.
22   Identify equipment and materials that provide best value for money.
23   Support colleagues to maximise their performance and value to the organisation.
24   Establish and maintain procedures for the maintenance of equipment.
25   Improve your working methods and the use of technology to support sustainability.

UNIT J6WW 04 (S302)   Undertake and Support Work Practices in a Business Environment

Knowledge

You need to know and understand:

Support your organisation's purpose and values
1   Your organisation's mission and team's objectives.
2   Your organisation's purpose, policies, procedures and values.
3   The remit of your work responsibilities and authority.
4   The working practices with external organisations and stakeholders.
5   How improve your working practices in accordance with organisation's goals and objectives.

Assess and manage risks
6   The sources of risks in the work that you do.
7   How to assess and monitor risks.
8   The risk monitoring and mitigation methods.
9   The importance of reviewing and evaluating how to identify risks.

Maintain security and confidentiality
10   The purpose and benefits of maintaining security and confidentiality.
11   Your organisational procedures and current legislation about data protection and use of technologies.
12   How to report any concerns about security and confidentiality to the relevant member of staff or agency.

Support diversity
13   What is meant by diversity and why it should be valued.
14   The working environment that promotes diversity and respects all members of staff within your organisation.
15   The purpose and benefits of working with colleagues and using their experience to improve your working practices and methods of communication.
16   The methods of interaction with respect to colleagues' their background, abilities, values, customs and beliefs.
17   The advantages of supporting diversity within your organisation.
18   How to ensure the working environment is supportive of diversity and makes best use of the talents of all those involved.
19   How to uphold the rights of members of staff.
20   The relevant legislation in support of equality and diversity in a working environment.

UNIT J6WW 04 (S302)   Undertake and Support Work Practices in a Business Environment

Knowledge (cont'd)

Support sustainability

21 The main causes of waste in a business administration environment and how to minimise these.
22 The social and legal requirements for recycling and disposal of waste and the organisational procedures in place to support these.
23 How regular maintenance of equipment can help to minimise waste and the procedures you should put in place.
24 How to use technology to work help improve working practices.
25 How to engage all stakeholders in continuously improving working methods and the use of technology to achieve maximum efficiency.
26 How to select sources of materials and equipment that provide best value for money.
27 The purpose and benefits of considering issues of corporate social responsibility when selecting suppliers.
28 Your working methods and the use of technology to support sustainability.

UNIT J6WW 04 (S302)   Undertake and Support Work Practices in a Business Environment

Record of evidence

Performance indicators	Evidence numbers	Evidence type
Support your organisation's purpose and values		
1 Support your organisation's overall mission and team's objectives.		
2 Identify your organisation's purpose, policies, procedures and values.		
3 Put your organisation's values into practice in all aspects of your work.		
4 Work with external organisations and stakeholders in a way that improves the image of your organisation.		
5 Improve your working practices in accordance with organisation's objectives, policies, systems, procedures and values.		
Assess and manage risks		
6 Identify possible sources of risk.		
7 Assess the levels of risks.		
8 Monitor and mitigate risks.		
9 Identify any potential risks and manage these when they occur.		
10 Evaluate and your methods of assessing and managing risks.		
Maintain security and confidentiality		
11 Maintain the security and confidentiality of information in accordance with organisational procedures and current legislation about data protection and use of technologies.		
12 Report any concerns about security and confidentiality to the relevant member of staff or agency.		
Support diversity		
13 Establish and maintain a working environment that values diversity and respects all members of staff within your organisation.		
14 Work with colleagues and use their experience to improve your working practices and methods of communication.		
15 Interact with colleagues in a professional manner that respects their background, abilities, values, customs and beliefs.		
16 Uphold the rights of members of staff who are different from you.		
17 Follow your organisation's procedures and legal requirements in relation to equality legislation.		

UNIT J6WW 04 (S302) Undertake and Support Work Practices in a Business Environment

Performance indicators	Evidence numbers	Evidence type
Support sustainability		
18 Establish and maintain procedures for waste management.		
19 Keep waste to a minimum and follow procedures for the recycling and disposal of waste materials.		
20 Follow relevant procedures for maintenance of equipment.		
21 Continuously review working methods, including use of technology, and ways of improving efficiency.		
22 Identify equipment and materials that provide best value for money.		
23 Support colleagues to maximise their performance and value to the organisation.		
24 Establish and maintain procedures for the maintenance of equipment.		
25 Improve your working methods and the use of technology to support sustainability.		

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

UNIT J6WW 04 (S302) Undertake and Support Work Practices in a Business Environment

Knowledge requirements	Evidence numbers	Evidence type
Support your organisation's purpose and values		
1 Your organisation's mission and team's objectives.		
2 Your organisation's purpose, policies, procedures and values.		
3 The remit of your work responsibilities and authority.		
4 The working practices with external organisations and stakeholders.		
5 How improve your working practices in accordance with organisation's goals and objectives.		
Assess and manage risks		
6 The sources of risks in the work that you do.		
7 How to assess and monitor risks.		
8 The risk monitoring and mitigation methods.		
9 The importance of reviewing and evaluating how to identify risks.		
Maintain security and confidentiality		
10 The purpose and benefits of maintaining security and confidentiality.		
11 Your organisational procedures and current legislation about data protection and use of technologies.		
12 How to report any concerns about security and confidentiality to the relevant member of staff or agency.		
Support diversity		
13 What is meant by diversity and why it should be valued.		
14 The working environment that promotes diversity and respects all members of staff within your organisation.		
15 The purpose and benefits of working with colleagues and using their experience to improve your working practices and methods of communication.		
16 The methods of interaction with respect to colleagues' their background, abilities, values, customs and beliefs.		
17 The advantages of supporting diversity within your organisation.		
18 How to ensure the working environment is supportive of diversity and makes best use of the talents of all those involved.		
19 How to uphold the rights of members of staff.		
20 The relevant legislation in support of equality and diversity in a working environment.		

UNIT J6WW 04 (S302) Undertake and Support Work Practices in a Business Environment

Knowledge requirements	Evidence numbers	Evidence type
Support sustainability		
21 The main causes of waste in a business administration environment and how to minimise these.		
22 The social and legal requirements for recycling and disposal of waste and the organisational procedures in place to support these.		
23 How regular maintenance of equipment can help to minimise waste and the procedures you should put in place.		
24 How to use technology to work help improve working practices.		
25 How to engage all stakeholders in continuously improving working methods and the use of technology to achieve maximum efficiency.		
26 How to select sources of materials and equipment that provide best value for money.		
27 The purpose and benefits of considering issues of corporate social responsibility when selecting suppliers.		
28 Your working methods and the use of technology to support sustainability.		

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 J6WX 04 (S308)   Communicate in a Business Environment

Unit summary

This standard is about communicating in a business environment. It covers meeting and welcoming visitors, providing individuals with information, ensuring visitors' needs are met, presenting a professional image of the organisation. You identify the purpose of communications, audience needs, decide communication methods and platforms to achieve outcomes. You use various types of communication that vary from face-to-face, on the telephone or in a virtual environment through relevant digital technologies and collaboration platforms. You communicate in ways that suit the audience, making decisions about the level of formality required for the communication and how to present ideas in a way that will engage the audience. You seek feedback to ensure that the communication achieved its purpose and to further develop your communication skills.

It is for professionals in business administration roles who plan communication and communicate in a business environment.

Skills

You will apply the following skills:

♦ Communicating.
♦ Organising.
♦ Preparing.
♦ Reflecting.
♦ Analysing.
♦ Evaluating.
♦ Judging.

Performance criteria

You must be able to:

1   Identify the purpose of communication.
2   Identify audiences for communication.
3   Choose communication style that meets the needs of audiences.
4   Decide the methods for each type of communication.
5   Identify and use the digital technologies and collaboration platforms for different types of communication.
6   Define the communication outcomes to be achieved.
7   Record any messages and forward them to the relevant members of staff.
8   Respond to messages or queries within agreed organisational timing and format.
9   Meet communication deadlines, prioritising what is important and what is urgent.
10   Select information that supports the purpose of communications.
11   Extract the main points needed from written materials.
12   Organise, structure and write information to match communication messages.
13   Organise, structure and write information to suit different audiences.

UNIT J6WX 04 (S308)   Communicate in a Business Environment

Performance criteria (cont'd)

14 Use accurate grammar, punctuation and spelling.
15 Write communications in your organisation's required format, layout, tone and house style.
16 Write communications that match the subject matter, work situation and communication channel.
17 Proofread written work and make amendments to create final version.
18 File copies of all communications following organisational procedures.
19 Present verbal information and ideas to audiences.
20 Make verbal contributions to move discussions forward.
21 Use body language and voice tone that matches the messages.
22 Listen actively to speakers to gain information.
23 Respond to speakers to share your perspective.
24 Ask questions to check understanding of speaker messages.
25 Direct discussions to achieve outcomes.
26 Adapt your contributions to suit the audience, purpose and situation.
27 Respond to speakers using body language to suit the audience and situation.
28 Provide opportunities for speakers to contribute their ideas and opinions.
29 Consider the ideas and opinions of different speakers.
30 Overcome barriers to verbal communication.
31 Summarise verbal communications with speakers to confirm agreement.
32 Seek feedback on your communication manners, format and style.
33 Evaluate all means of communication to identify how well they met their purpose.
34 Reflect on communications outcomes.
35 Identify ways to develop your communication skills further.

UNIT J6WX 04 (S308)   Communicate in a Business Environment

Knowledge

You will need to know and understand:

1   The reasons for identifying the purpose of communication.
2   The communication style in accordance with the needs of the audience.
3   The importance of understanding the audience and the outcomes to be achieved.
4   The digital technologies and collaboration platforms for different types of communication.
5   How to define the outcomes for different types of communications.
6   The methods of communication that can be used and how to select them according to the situation.
7   How to identify the relevant style for communications.
8   The sources of information used for written communications and how to extract key points.
9   How to check the accuracy of information.
10 The importance of using language appropriate to the audience, the communication method and the purpose of the communication.
11 How to use grammar, punctuation and spelling accurately.
12 The reasons for proofreading and checking written communications and the potential impact of errors.
13 How to recognise when work is urgent or important to prioritise written communications.
14 The organisational procedures for responding to written message.
15 How to record any messages and forward them to the relevant members of staff.
16 How to format information following organisational guidelines.
17 The principles of 'netiquette' in online communications.
18 How to judge the tone and style required for written communications and the impact that these can have on audiences.
19 How to organise, structure and present information to different audiences.
20 How to communicate information and ideas to different audiences.
21 How to contribute to discussions that will help to move them forward to achieve objectives.
22 How to interpret speakers body language and tone of voice.
23 How to use body language and tone of voice to support communication messages.
24 The importance of active listening and methods that can be used.
25 The ways of contributing and directing discussions to achieve outcomes.
26 The importance of adapting verbal contributions to suit different audiences, purposes and situations.
27 How to use language to suit the audience and situation.
28 The reasons for seeking ideas and opinions from others and for taking these into account.
29 The barriers to verbal communication and how these can be overcome.
30 The reasons for summarising communication and the impact this has.
31 How to seek feedback to check that communications achieve their purpose.
32 The value of reflecting on the outcomes of communication and of identifying ways to further develop your communication skills.
33 The legal, organisational, codes of practice and policies relevant to your role and the activities being carried out.

UNIT J6WX 04 (S308)   Communicate in a Business Environment

Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Identify the purpose of communication.		
2 Identify audiences for communication.		
3 Choose communication style that meets the needs of audiences.		
4 Decide the methods for each type of communication.		
5 Identify and use the digital technologies and collaboration platforms for different types of communication.		
6 Define the communication outcomes to be achieved.		
7 Record any messages and forward them to the relevant members of staff.		
8 Respond to messages or queries within agreed organisational timing and format.		
9 Meet communication deadlines, prioritising what is important and what is urgent.		
10 Select information that supports the purpose of communications.		
11 Extract the main points needed from written materials.		
12 Organise, structure and write information to match communication messages.		
13 Organise, structure and write information to suit different audiences.		
14 Use accurate grammar, punctuation and spelling.		
15 Write communications in your organisation's required format, layout, tone and house style.		
16 Write communications that match the subject matter, work situation and communication channel.		
17 Proofread written work and make amendments to create final version.		
18 File copies of all communications following organisational procedures.		
19 Present verbal information and ideas to audiences.		
20 Make verbal contributions to move discussions forward.		
21 Use body language and voice tone that matches the messages.		
22 Listen actively to speakers to gain information.		
23 Respond to speakers to share your perspective.		
24 Ask questions to check understanding of speaker messages.		
25 Direct discussions to achieve outcomes.		

UNIT J6WX 04 (S308)   Communicate in a Business Environment

Performance indicators	Evidence numbers	Evidence type
26 Adapt your contributions to suit the audience, purpose and situation.		
27 Respond to speakers using body language to suit the audience and situation.		
28 Provide opportunities for speakers to contribute their ideas and opinions.		
29 Consider the ideas and opinions of different speakers.		
30 Overcome barriers to verbal communication.		
31 Summarise verbal communications with speakers to confirm agreement.		
32 Seek feedback on your communication manners, format and style.		
33 Evaluate all means of communication to identify how well they met their purpose.		
34 Reflect on communications outcomes.		
35 Identify ways to develop your communication skills further.		

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

UNIT J6WX 04 (S308)   Communicate in a Business Environment

	Knowledge requirements	Evidence numbers	Evidence type
1	The reasons for identifying the purpose of communication.		
2	The communication style in accordance with the needs of the audience.		
3	The importance of understanding the audience and the outcomes to be achieved.		
4	The digital technologies and collaboration platforms for different types of communication.		
5	How to define the outcomes for different types of communications.		
6	The methods of communication that can be used and how to select them according to the situation.		
7	How to identify the relevant style for communications.		
8	The sources of information used for written communications and how to extract key points.		
9	How to check the accuracy of information.		
10	The importance of using language appropriate to the audience, the communication method and the purpose of the communication.		
11	How to use grammar, punctuation and spelling accurately.		
12	The reasons for proofreading and checking written communications and the potential impact of errors.		
13	How to recognise when work is urgent or important to prioritise written communications.		
14	The organisational procedures for responding to written message.		
15	How to record any messages and forward them to the relevant members of staff.		
16	How to format information following organisational guidelines.		
17	The principles of 'netiquette' in online communications.		
18	How to judge the tone and style required for written communications and the impact that these can have on audiences.		
19	How to organise, structure and present information to different audiences.		
20	How to communicate information and ideas to different audiences.		
21	How to contribute to discussions that will help to move them forward to achieve objectives.		

UNIT J6WX 04 (S308)   Communicate in a Business Environment

	Knowledge requirements	Evidence numbers	Evidence type
22	How to interpret speakers body language and tone of voice.		
23	How to use body language and tone of voice to support communication messages.		
24	The importance of active listening and methods that can be used.		
25	The ways of contributing and directing discussions to achieve outcomes.		
26	The importance of adapting verbal contributions to suit different audiences, purposes and situations.		
27	How to use language to suit the audience and situation.		
28	The reasons for seeking ideas and opinions from others and for taking these into account.		
29	The barriers to verbal communication and how these can be overcome.		
30	The reasons for summarising communication and the impact this has.		
31	How to seek feedback to check that communications achieve their purpose.		
32	The value of reflecting on the outcomes of communication and of identifying ways to further develop your communication skills.		
33	The legal, organisational, codes of practice and policies relevant to your role and the activities being carried 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 J6X0 04 (S311)   Design and Produce Documents in a Business Environment

Unit summary

This standard is about designing and producing high-quality, professional documents in accordance with agreed specifications. It includes clarifying the requirements for the documents, checking work for accuracy, editing and correcting these as necessary.

This standard is for business administration professionals who design and produce documents.

Skills

You will apply the following skills:

♦ Checking.
♦ Designing.
♦ Listening.
♦ Managing time.
♦ Negotiating.
♦ Organising.
♦ Questioning.
♦ Researching.
♦ Using technology.
♦ Using version control.
♦ Reviewing, proofreading, editing.

Performance criteria

You must be able to:

1   Agree the purpose, content, style, quality standards for the documents.
2   Confirm the deadlines for completion of the documents.
3   Allocate and prepare the required resources for the documents' production.
4   Research and prepare the required content.
5   Use the relevant technology for the documents' production.
6   Draft the documents in accordance with agreed specifications and format.
7   Review the drafts and incorporate review comments.
8   Check the documents for accuracy and amend as required.
9   Design and produce the documents in the agreed style.
10   Integrate non-text objects in the agreed layout.
11   Save and store the document safely and securely in relevant locations.
12   Adhere to the relevant data protection and confidentiality legislation.
13   Clarify document requirements, when necessary.
14   Use the relevant methods for the documents' version control.
15   Review, edit and update the documents on a regular basis.

UNIT J6X0 04 (S311)   Design and Produce Documents in a Business Environment

Knowledge

You need to know and understand:

1   The purpose, content, style, quality standards for the documents.
2   The deadlines for completion of the documents.
3   How to allocate and prepare the required resources for the documents' production.
4   The different formats in which the documents can be presented.
5   The different types of technology available for inputting, formatting and editing documents and their main features.
6   The agreed specifications and formats for the documents' production.
7   How to seek the review of the documents and incorporate the comments.
8   How to check the documents for accuracy, including spelling and grammar.
9   How to design the documents in the agreed style.
10   How to integrate and layout text and non-text objects.
11   How to save and store the document safely and securely.
12   The relevant data protection and confidentiality legislation.
13   The methods of keeping version control of the documents.
14   Why it is important to review and update the documents on a regular basis.

UNIT J6X0 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 for the documents.		
2 Confirm the deadlines for completion of the documents.		
3 Allocate and prepare the required resources for the documents' production.		
4 Research and prepare the required content.		
5 Use the relevant technology for the documents' production.		
6 Draft the documents in accordance with agreed specifications and format.		
7 Review the drafts and incorporate review comments.		
8 Check the documents for accuracy and amend as required.		
9 Design and produce the documents in the agreed style.		
10 Integrate non-text objects in the agreed layout.		
11 Save and store the document safely and securely in relevant locations.		
12 Adhere to the relevant data protection and confidentiality legislation.		
13 Clarify document requirements, when necessary.		
14 Use the relevant methods for the documents' version control		
15 Review, edit and update the documents on a regular basis		

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

UNIT J6X0 04 (S311)　　Design and Produce Documents in a Business Environment

Knowledge requirements	Evidence numbers	Evidence type
1　The purpose, content, style, quality standards for the documents.		
2　The deadlines for completion of the documents.		
3　How to allocate and prepare the required resources for the documents' production.		
4　The different formats in which the documents can be presented.		
5　The different types of technology available for inputting, formatting and editing documents and their main features.		
6　The agreed specifications and formats for the documents' production.		
7　How to seek the review of the documents and incorporate the comments.		
8　How to check the documents for accuracy, including spelling and grammar.		
9　How to design the documents in the agreed style.		
10　How to integrate and layout text and non-text objects.		
11　How to save and store the document safely and securely.		
12　The relevant data protection and confidentiality legislation.		
13　The methods of keeping version control of the documents.		
14　Why it is important to review and update the documents on a regular basis		

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Candidate: _____　　**Date:** _____

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

UNIT FE03 04 (S303)   Solve Business Problems

Unit summary

Identify, analyse, plan and solve business problems.

Skills

You will apply the following skills:

- Analysing.
- Communicating.
- Decision-making.
- Evaluating.
- Organising.
- Planning.
- Problem solving.
- Working with others.

Performance indicators

You will:

1   Recognise when a business problem exists.
2   Confirm the business problem is understood.
3   Identify reasons for the business problem occurring.
4   Analyse the business problem, gathering additional information as necessary.
5   Discuss the business problem with others.
6   Develop and justify an approach to solving the business problem.
7   Plan chosen approach to solving the business problem.
8   Decide how to recognise when the business problem has been solved.
9   Agree the plan with the appropriate authority.
10   Put the plan into action.
11   Use support and feedback from others to help solve the business problem.
12   Systematically review progress towards solving the business problem, adjusting the plan as necessary.
13   Evaluate the approach towards solving the business problem, evaluating other approaches which may have been more productive.

UNIT FE03 04 (S303)   Solve Business Problems

Knowledge

You will know:

1   How to recognise when a business problem exists.
2   How to identify the potential causes of a business problem.
3   How to analyse business problems.
4   Problem solving techniques.
5   Organisational policies and procedures that need to be taken into account.
6   Legal or regulatory requirements that may need to be taken into account.
7   Planning techniques.
8   Reasons for using support and feedback from others.
9   The purpose and benefits of systematically reviewing progress and adjusting plans as necessary.
10   How to recognise when the business problem has been solved.
11   How to evaluate the approach to solving the business problem.

UNIT FE03 04 (S303)   Solve Business Problems

Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Recognise when a business problem exists.		
2 Confirm the business problem is understood.		
3 Identify reasons for the business problem occurring.		
4 Analyse the business problem, gathering additional information as necessary.		
5 Discuss the business problem with others.		
6 Develop and justify an approach to solving the business problem.		
7 Plan chosen approach to solving the business problem.		
8 Decide how to recognise when the business problem has been solved.		
9 Agree the plan with the appropriate authority.		
10 Put the plan into action.		
11 Use support and feedback from others to help solve the business problem.		
12 Systematically review progress towards solving the business problem, adjusting the plan as necessary.		
13 Evaluate the approach towards solving the business problem, evaluating other approaches which may have been more productive.		

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

UNIT FE03 04 (S303)   Solve Business Problems

Knowledge requirements		Evidence numbers	Evidence type
1	How to recognise when a business problem exists.		
2	How to identify the potential causes of a business problem.		
3	How to analyse business problems.		
4	Problem solving techniques.		
5	Organisational policies and procedures that need to be taken into account.		
6	Legal or regulatory requirements that may need to be taken into account.		
7	Planning techniques.		
8	Reasons for using support and feedback from others.		
9	The purpose and benefits of systematically reviewing progress and adjusting plans as necessary.		
10	How to recognise when the business problem has been solved.		
11	How to evaluate the approach to solving the business problem.		

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 J6X4 04 (S304)   Collaborate and Provide Support in a Business Environment

Unit summary

This standard is about collaborating and providing support in a business environment. It covers working collaboratively with other members of staff to achieve the organisational goals and objectives. It includes supporting team members, sharing work goals, objectives, seeking feedback and working in a way that recognises the strengths or weaknesses of your colleagues and other members of staff, whilst also presenting and promoting a professional image of your organisation. This standard is also addressing planning, solving and evaluating business problems.

It is for professionals in business administration roles who collaborate and provide support in a business environment.

Skills

You will apply the following skills:

♦   Communicating.
♦   Managing time.
♦   Negotiating.
♦   Planning.
♦   Problem solving.
♦   Resolving disagreement.
♦   Team working.
♦   Working with others.

Performance criteria

You must be able to:

1   Work in a way that supports your organisation's mission and your team's objectives.
2   Put your organisation's values into your working practices.
3   Welcome opportunities to work with other colleagues to achieve set outcomes.
4   Follow organisational policies and procedures relevant to your job.
5   Work with your colleagues and other members of staff to maintain a professional image of your organisation.
6   Share work goals and plan work objectives with your colleagues and other members of staff.
7   Seek guidance from colleagues and other members of staff, when required.
8   Contribute to improving organisational objectives, policies, procedures and values.
9   Work with external organisations and stakeholders in a way that promotes a professional image of your organisation.
10   Provide support to other team members as appropriate.

UNIT J6X4 04 (S304)   Collaborate and Provide Support in a Business Environment

Performance criteria

You must be able to:

11   Work in a way that recognises the strengths or weaknesses of your colleagues and members of staff.
12   Communicate with colleagues, other members of staff and stakeholders.
13   Refer problems and disagreements to an appropriate member of staff.
14   Recognise when a business problem exists.
15   Analyse the business problem, collating additional information as necessary.
16   Discuss the business problem with colleagues or senior members of staff.
17   Agree an approach to solve the business problem.
18   Seek feedback from colleagues and other members of staff to improve own work.
19   Share feedback for identification of improvements or on the achievement of objectives.

UNIT J6X4 04 (S304)   Collaborate and Provide Support in a Business Environment

Knowledge

You need to know and understand:

1   The remit of your role and your responsibilities at work.
2   How to work in a way that supports your organisation's overall mission and your team's objectives.
3   How your role fits into the organisation's structure and contributes to its operations.
4   How to work with colleagues and other members of staff to achieve set outcomes.
5   The purpose of working with colleagues and other members of staff to achieve goals and objectives.
6   The policies, procedures and values of the organisation that are relevant to own job role.
7   How to put your organisation's values into your working practice.
8   Who to consult about organisational policies, objectives and values.
9   Why working with colleagues and other members of staff can achieve set outcomes.
10 The purpose of sharing work goals and plans when working with colleagues and other members of staff.
11 How to contribute to improving objectives, policies, procedures and values.
12 The methods of communication with colleagues, other members of staff and stakeholders.
13 How to recognise when a business problem exists.
14 The methods of analysis of a business problem and additional information to support it.
15 The resources needed to solve business problems.
16 How to work in a way that recognises the strengths or weaknesses of colleagues and other members of staff.
17 How to work with external organisations and stakeholders in a way that promotes a professional image of your organisation.
18 The types of issues and disagreements that can occur when working with others and how to resolve them.
19 The purpose of giving and receiving constructive feedback
20 How to make use of feedback to improve your work and the work of your colleagues and other members of staff.

UNIT J6X4 04 (S304)   Collaborate and Provide Support in a Business Environment

Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Work in a way that supports your organisation's mission and your team's objectives.		
2 Put your organisation's values into your working practices.		
3 Welcome opportunities to work with other colleagues to achieve set outcomes.		
4 Follow organisational policies and procedures relevant to your job.		
5 Work with your colleagues and other members of staff to maintain a professional image of your organisation.		
6 Share work goals and plan work objectives with your colleagues and other members of staff.		
7 Seek guidance from colleagues and other members of staff, when required.		
8 Contribute to improving organisational objectives, policies, procedures and values.		
9 Work with external organisations and stakeholders in a way that promotes a professional image of your organisation.		
10 Provide support to other team members as appropriate.		
11 Work in a way that recognises the strengths or weaknesses of your colleagues and members of staff.		
12 Communicate with colleagues, other members of staff and stakeholders.		
13 Refer problems and disagreements to an appropriate member of staff.		
14 Recognise when a business problem exists.		
15 Analyse the business problem, collating additional information as necessary.		
16 Discuss the business problem with colleagues or senior members of staff.		
17 Agree an approach to solve the business problem.		
18 Seek feedback from colleagues and other members of staff to improve own work.		
19 Share feedback for identification of improvements or on the achievement of objectives.		

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

UNIT J6X4 04 (S304)   Collaborate and Provide Support in a Business Environment

Knowledge requirements	Evidence numbers	Evidence type
1 The remit of your role and your responsibilities at work.		
2 How to work in a way that supports your organisation's overall mission and your team's objectives.		
3 How your role fits into the organisation's structure and contributes to its operations.		
4 How to work with colleagues and other members of staff to achieve set outcomes.		
5 The purpose of working with colleagues and other members of staff to achieve goals and objectives.		
6 The policies, procedures and values of the organisation that are relevant to own job role.		
7 How to put your organisation's values into your working practice.		
8 Who to consult about organisational policies, objectives and values.		
9 Why working with colleagues and other members of staff can achieve set outcomes.		
10 The purpose of sharing work goals and plans when working with colleagues and other members of staff.		
11 How to contribute to improving objectives, policies, procedures and values.		
12 The methods of communication with colleagues, other members of staff and stakeholders.		
13 How to recognise when a business problem exists.		
14 The methods of analysis of a business problem and additional information to support it.		
15 The resources needed to solve business problems.		
16 How to work in a way that recognises the strengths or weaknesses of colleagues and other members of staff.		
17 How to work with external organisations and stakeholders in a way that promotes a professional image of your organisation.		
18 The types of issues and disagreements that can occur when working with others and how to resolve them		
19 The purpose of giving and receiving constructive feedback.		
20 How to make use of feedback to improve your work and the work of your colleagues and other members of staff.		

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

UNIT J6X4 04 (S304) Collaborate and Provide Support in a Business Environment

Candidate: _____ **Date:** _____

Assessor: _____ **Date:** _____

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

UNIT FE05 04 (S305)   Contribute to Decision-making in a Business Environment

Unit summary

Contribute information and ideas to influence the decision-making process.

Skills

You will apply the following skills:

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

Performance indicators

You will:

1   Research information to add value to the decision-making process.
2   Use accurate and current information to develop ideas to present to others.
3   Make constructive, relevant and timely contributions to meetings or other discussions to aid decision-making.
4   Respond positively when asked to supply information to help with decision-making.
5   Contribute to identifying decision-making criteria.
6   Structure ideas, information and recommendations in a way that helps other people understand.
7   Proactively engage with colleagues involved in the decision-making process and respect their contributions.
8   Influence decision-making by using evidence, argument, questioning and assertiveness.
9   Show support for the decision even when not in agreement.

UNIT FE05 04 (S305)   Contribute to Decision-making in a Business Environment

Knowledge

You will know:

1   Key stages in the decision-making process.
2   The context in which the decision is being made.
3   Own role in assisting decision-making, its scope and limitations.
4   Sources of information useful for influencing decision-making.
5   How to research information.
6   How to contribute to meetings and other discussions where decisions are being made.
7   The purpose and benefits of respecting other people's contributions to the decision-making.
8   How to engage proactively with colleagues during decision-making.
9   How to use evidence, argument, questioning and assertiveness to influence outcomes.
10 The concept of collective responsibility and why it is important.

UNIT FE05 04 (S305)   Contribute to Decision-making in a Business Environment

Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Research information to add value to the decision-making process.		
2 Use accurate and current information to develop ideas to present to others.		
3 Make constructive, relevant and timely contributions to meetings or other discussions to aid decision-making.		
4 Respond positively when asked to supply information to help with decision-making.		
5 Contribute to identifying decision-making criteria.		
6 Structure ideas, information and recommendations in a way that helps other people understand.		
7 Proactively engage with colleagues involved in the decision-making process and respect their contributions.		
8 Influence decision-making by using evidence, argument, questioning and assertiveness.		
9 Show support for the decision even when not in agreement.		

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

UNIT FE05 04 (S305) Contribute to Decision-making in a Business Environment

Knowledge requirements		Evidence numbers	Evidence type
1	Key stages in the decision-making process.		
2	The context in which the decision is being made.		
3	Own role in assisting decision-making, its scope and limitations.		
4	Sources of information useful for influencing decision-making.		
5	How to research information.		
6	How to contribute to meetings and other discussions where decisions are being made.		
7	The purpose and benefits of respecting other people's contributions to the decision-making.		
8	How to engage proactively with colleagues during decision-making.		
9	How to use evidence, argument, questioning and assertiveness to influence outcomes.		
10	The concept of collective responsibility and why it 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: _____   **Date:** _____
(if sampled)

UNIT FE06 04 (S306) Contribute to Negotiations in a Business Environment

Unit summary

Contribute to negotiations with a third party to achieve planned objectives.

Skills

You will apply the following skills:

♦ Communicating.
♦ Negotiating.
♦ Planning.
♦ Problem solving.
♦ Making proposals.
♦ Reporting.
♦ Researching.

Performance indicators

You will:

1 Prepare a negotiating brief for all relevant matters.
2 Identify potential problems in negotiations and suggest solutions to overcome them.
3 Make proposals which meet personal organisation objectives and those of the people being negotiated with.
4 Clarify other people's understanding and respond to their queries and objections.
5 Suggest solutions to deal with problems.
6 Work within the limits of job role, responsibility and authorisation.
7 Refer the negotiation to senior decision-makers when matters arise which require a higher level of authority to agree.
8 Reach an agreement to the mutual satisfaction of all those involved in the negotiations, where possible.
9 Conduct negotiations in a way which creates goodwill and promotes a positive image of self and the organisation.
10 Maintain clear and accurate records of the negotiations and outcomes and agree them with all involved.
11 Complete negotiations in a way that maintains goodwill and promotes a positive image of self and the organisation.

UNIT FE06 04 (S306)   Contribute to Negotiations in a Business Environment

Knowledge

You will know:

1 The principles of negotiation.
2 The process of negotiation and how negotiation is used in business.
3 Commercial and ethical frameworks that are considered important in negotiations.
4 Negotiation strategies and techniques.
5 The role(s) and level(s) of responsibility of work colleagues prior to negotiations.
6 The benefits of having clear and realistic objectives and preparing compromise positions.
7 Job role level of responsibility and authority in the negotiation process.
8 The purpose and benefits of being flexible during negotiations while still seeking to achieve principal objectives.
9 The purpose of keeping to the brief and level of authority during negotiations.
10 Senior decision-makers to whom to refer issues when the issue is above own authorisation level.
11 How to maintain goodwill during negotiations and the benefits of achieving this.
12 The purpose and benefits of keeping accurate records of negotiations.

UNIT FE06 04 (S306) Contribute to Negotiations in a Business Environment

Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Prepare a negotiating brief for all relevant matters.		
2 Identify potential problems in negotiations and suggest solutions to overcome them.		
3 Make proposals which meet personal organisation objectives and those of the people being negotiated with.		
4 Clarify other people's understanding and respond to their queries and objections.		
5 Suggest solutions to deal with problems.		
6 Work within the limits of job role, responsibility and authorisation.		
7 Refer the negotiation to senior decision-makers when matters arise which require a higher level of authority to agree.		
8 Reach an agreement to the mutual satisfaction of all those involved in the negotiations, where possible.		
9 Conduct negotiations in a way which creates goodwill and promotes a positive image of self and the organisation.		
10 Maintain clear and accurate records of the negotiations and outcomes and agree them with all involved.		
11 Complete negotiations in a way that maintains goodwill and promotes a positive image of self and the organisation.		

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

UNIT FE06 04 (S306) Contribute to Negotiations in a Business Environment

Knowledge requirements		Evidence numbers	Evidence type
1	The principles of negotiation.		
2	The process of negotiation and how negotiation is used in business.		
3	Commercial and ethical frameworks that are considered important in negotiations.		
4	Negotiation strategies and techniques.		
5	The role(s) and level(s) of responsibility of work colleagues prior to negotiations.		
6	The benefits of having clear and realistic objectives and preparing compromise positions.		
7	Job role level of responsibility and authority in the negotiation process.		
8	The purpose and benefits of being flexible during negotiations while still seeking to achieve principal objectives.		
9	The purpose of keeping to the brief and level of authority during negotiations.		
10	Senior decision-makers to whom to refer issues when the issue is above own authorisation level.		
11	How to maintain goodwill during negotiations and the benefits of achieving this.		
12	The purpose and benefits of keeping accurate records of negotiations.		

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Candidate: _____   **Date:** _____

Assessor: _____   **Date:** _____

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

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

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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 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.

UNIT J6WT 04 (S324)   Support Organisational Projects

Record of evidence

Performance indicators	Evidence numbers	Evidence type
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.		

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

UNIT J6WT 04 (S324) Support Organisational Projects

Knowledge requirements		Evidence numbers	Evidence type
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 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: _____ **Date:** _____
(if sampled)

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

UNIT H98C 04 (S413) Design and Develop an Information System

Unit summary

Design, develop and test information systems to meet organisational and users' needs.

Skills

You will apply the following skills:

- Analysing
- Evaluating
- Managing resources
- Negotiating
- Organising
- Planning
- Researching
- Using technology
- Problem solving

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 Design a system specification that meets identified needs and budgetary controls.
4 Develop an information system that meets the specification.
5 Test the information system against the agreed specification.

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 The purpose and benefits of identifying and agreeing user needs for an information system and developing specifications based on these.
5 How to develop specifications for information management, including resources and budgets.
6 How to create and develop an information system based on identified user needs.
7 The purpose and benefits of testing information systems.
8 How to test an information system.

UNIT H98C 04 (S413)   Design and Develop an Information System

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 Design a system specification that meets identified needs and budgetary controls.		
4 Develop an information system that meets the specification.		
5 Test the information system against the agreed specification.		

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 The purpose and benefits of identifying and agreeing user needs for an information system and developing specifications based on these.		
5 How to develop specifications for information management, including resources and budgets.		
6 How to create and develop an information system based on identified user needs.		
7 The purpose and benefits of testing information systems.		
8 How to test an information system.		

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 FD9A 04 (S226)   Support the Management and Development of an Information System

Unit summary

Support the management and evaluation of an information system to meet organisational and users' needs.

Skills

You will apply the following skills:

♦   Analysing.
♦   Developing others.
♦   Evaluating.
♦   Managing resources.
♦   Monitoring.
♦   Organising.
♦   Problem solving.
♦   Negotiating.
♦   Using technology.
♦   Planning.
♦   Researching.

Performance indicators

You will:

1   Contribute to the provision of training and ongoing support to users.
2   Monitor own use of an information system.
3   Follow legal and organisational requirements for handling information.
4   Make sure the information system is maintained and updated to meet users' needs, within the limits of own authority.
5   Collect feedback on performance of information systems.
6   Contribute to the evaluation of feedback and prioritise development needs.
7   Contribute information to enable further system development.
8   Identify and report problems when they occur.
9   Resolve problems within the limits of own authority.

UNIT FD9A 04 (S226)   Support the Management and Development of an Information System

Knowledge

You will know:

1   The benefits of training users of the information system and of providing on going support.
2   The benefits of monitoring the use of information systems using available methods.
3   The purpose of maintaining and updating the information system and the methods you can use.
4   The types of problems that occur with information systems.
5   How to identify and analyse problems and develop a strategy to solve them.
6   Legislation and organisational requirements covering data protection and freedom of information.
7   The different ways of evaluating information systems.

UNIT FD9A 04 (S226) Support the Management and Development of an Information System

Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Contribute to the provision of training and ongoing support to users.		
2 Monitor own use of an information system.		
3 Follow legal and organisational requirements for handling information.		
4 Make sure the information system is maintained and updated to meet users' needs, within the limits of own authority.		
5 Collect feedback on performance of information systems.		
6 Contribute to the evaluation of feedback and prioritise development needs.		
7 Contribute information to enable further system development.		
8 Identify and report problems when they occur.		
9 Resolve problems within the limits of own authority.		

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

UNIT FD9A 04 (S226)   Support the Management and Development of an Information System

Knowledge requirements	Evidence numbers	Evidence type
1 The benefits of training users of the information system and of providing on going support.		
2 The benefits of monitoring the use of information systems using available methods.		
3 The purpose of maintaining and updating the information system and the methods you can use.		
4 The types of problems that occur with information systems.		
5 How to identify and analyse problems and develop a strategy to solve them.		
6 Legislation and organisational requirements covering data protection and freedom of information.		
7 The different ways of evaluating information systems.		

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 FE1M 04 (S414)   Manage and Evaluate Information Systems

Unit summary

Monitor and evaluate information systems to meet organisational and users' needs.

Skills

You will apply the following skills:

♦   Analysing.
♦   Developing others.
♦   Evaluating.
♦   Managing resources.
♦   Monitoring.
♦   Organising.
♦   Problem solving.
♦   Negotiating.
♦   Using technology.
♦   Planning.
♦   Researching.

Performance indicators

You will:

1   Provide training and ongoing support to users.
2   Make sure management structures are in place to identify, analyse and resolve problems with the information system.
3   Monitor use of accuracy and productivity of the information system to meet organisational requirements.
4   Make sure the information system is maintained and updated to meet users' needs.
5   Make sure all requirements for relevant legislation are followed.
6   Collect feedback on performance of information systems.
7   Evaluate feedback and prioritise development needs.
8   Update information to enable further system development.

Knowledge

You will know:

1   Methods of training users of the information system and providing ongoing support.
2   Methods of monitoring the use of information systems.
3   Methods of maintaining and updating the information system.
4   The types of problems that occur with information systems.
5   How to identify and analyse problems and develop a strategy to solve them.
6   Methods of continuously improving information systems.
7   Legislation and organisational requirements covering data protection and freedom of information.
8   The different ways of evaluating information systems.

UNIT FE1M 04 (S414)   Manage and Evaluate Information Systems

Record of evidence

Performance indicators		Evidence numbers	Evidence type
1	Provide training and ongoing support to users.		
2	Make sure management structures are in place to identify, analyse and resolve problems with the information system.		
3	Monitor use of accuracy and productivity of the information system to meet organisational requirements.		
4	Make sure the information system is maintained and updated to meet users' needs.		
5	Make sure all requirements for relevant legislation are followed.		
6	Collect feedback on performance of information systems.		
7	Evaluate feedback and prioritise development needs.		
8	Update information to enable further system development.		

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

Knowledge requirements		Evidence numbers	Evidence type
1	Methods of training users of the information system and providing ongoing support.		
2	Methods of monitoring the use of information systems.		
3	Methods of maintaining and updating the information system.		
4	The types of problems that occur with information systems.		
5	How to identify and analyse problems and develop a strategy to solve them.		
6	Methods of continuously improving information systems.		
7	Legislation and organisational requirements covering data protection and freedom of information.		
8	The different ways of evaluating information systems.		

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 FE0T 04 (S319)   Organise and Co-ordinate Events

Unit summary

Agree a brief and budget for organising an event and decide on the operational activities and technical requirements to deliver the event.

Skills

You will apply the following skills:

♦ Checking.
♦ Communicating.
♦ Decision making.
♦ Evaluating.
♦ Interpersonal skills.
♦ Leading.
♦ Managing time.
♦ Negotiating.
♦ Managing resources.
♦ Planning.
♦ Monitoring.
♦ Problem solving.
♦ Organising.

Performance indicators

You will:

Before the event
1 Agree the event brief and budget.
2 Agree a plan for the event which will meet agreed objectives and address identified risks and contingencies.
3 Identify and agree the resources and support needed for the event.
4 Identify and cost suitable venues.
5 Make sure all relevant legal and contractual requirements are correctly addressed.
6 Make sure the event complies with relevant health, safety and security requirements.
7 Liaise with the venue to confirm event requirements.
8 Make sure invitations are sent out to delegates.
9 Manage resources and the production of event materials.
10 Manage delegate responses.
11 Prepare joining instructions and event materials to be sent to delegates.
12 Make arrangements for rehearsals, if required, to make sure that the event runs smoothly.
13 Make sure all those involved are briefed and trained to fulfil their roles.
14 Delegate functions to the event team as appropriate.

UNIT FE0T 04 (S319) Organise and Co-ordinate Events

Performance indicators (cont)

You will:

At the event
15 Prepare the venue and make sure all necessary resources are in place.
16 Co-ordinate activities and resources during the event, in line with agreed plans.
17 Help delegates to feel welcome.
18 Respond to delegates' needs throughout the event.
19 Resolve problems in a timely manner.
20 Oversee the work of key staff during the event.
21 Monitor compliance with relevant health, safety and security requirements.
22 Liaise with venue management to make sure facility resources are in place.

After the event
23 Clear and vacate the venue, in accordance with the terms of the contract.
24 Prepare and circulate papers or conduct other follow-up activities, if necessary.
25 Reconcile accounts to budget.
26 Seek and collect feedback from those involved in the event.
27 Analyse the feedback and share the analysis with relevant people.
28 Agree key learning points and use these to improve the running of future events.

Knowledge

You will know:

1   The role of an event organiser.
2   How to plan and manage events to meet the objectives of the brief.
3   The different types of events and their main features.
4   The purpose and value of agreeing a brief and budget for the event.
5   The types of risks associated with events and how to minimise these.
6   How to develop a contingency plan for an event.
7   The types of information that delegates will need.
8   How to identify suitable venues for different types of events.
9   The types of resources needed for different types of events.
10   The special requirements that delegates may have and how to meet these.
11   Health, safety and security requirements when organising events.
12   The relevant legal and organisational requirements for contracts.
13   The types of activities and resources that may need to be co-ordinated during an event.
14   The types of problems that may occur during events and how to solve them.
15   What points to observe when clearing and vacating an event.
16   The purpose and value of evaluating an event and the methods you can use.
17   The types of papers that may need to be circulated after an event.
18   Budgetary responsibilities and procedures.

UNIT FE0T 04 (S319) Organise and Co-ordinate Events

Record of evidence

Performance indicators	Evidence numbers	Evidence type
Before the event		
1 Agree the event brief and budget.		
2 Agree a plan for the event which will meet agreed objectives and address identified risks and contingencies.		
3 Identify and agree the resources and support needed for the event.		
4 Identify and cost suitable venues.		
5 Make sure all relevant legal and contractual requirements are correctly addressed.		
6 Make sure the event complies with relevant health, safety and security requirements.		
7 Liaise with the venue to confirm event requirements.		
8 Make sure invitations are sent out to delegates.		
9 Manage resources and the production of event materials.		
10 Manage delegate responses.		
11 Prepare joining instructions and event materials to be sent to delegates.		
12 Make arrangements for rehearsals, if required, to make sure that the event runs smoothly.		
13 Make sure all those involved are briefed and trained to fulfil their roles.		
14 Delegate functions to the event team as appropriate.		
At the event		
15 Prepare the venue and make sure all necessary resources are in place.		
16 Co-ordinate activities and resources during the event, in line with agreed plans.		
17 Help delegates to feel welcome.		
18 Respond to delegates' needs throughout the event.		
19 Resolve problems in a timely manner.		
20 Oversee the work of key staff during the event.		
21 Monitor compliance with relevant health, safety and security requirements.		
22 Liaise with venue management to make sure facility resources are in place.		

UNIT FE0T 04 (S319) Organise and Co-ordinate Events

Performance indicators (cont)	Evidence numbers	Evidence type
After the event		
23 Clear and vacate the venue, in accordance with the terms of the contract.		
24 Prepare and circulate papers or conduct other follow-up activities, if necessary.		
25 Reconcile accounts to budget.		
26 Seek and collect feedback from those involved in the event.		
27 Analyse the feedback and share the analysis with relevant people.		
28 Agree key learning points and use these to improve the running of future events.		

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

UNIT FE0T 04 (S319) Organise and Co-ordinate Events

Knowledge requirements		Evidence numbers	Evidence type
1	The role of an event organiser.		
2	How to plan and manage events to meet the objectives of the brief.		
3	The different types of events and their main features.		
4	The purpose and value of agreeing a brief and budget for the event.		
5	The types of risks associated with events and how to minimise these.		
6	How to develop a contingency plan for an event.		
7	The types of information that delegates will need.		
8	How to identify suitable venues for different types of events.		
9	The types of resources needed for different types of events.		
10	The special requirements that delegates may have and how to meet these.		
11	Health, safety and security requirements when organising events.		
12	The relevant legal and organisational requirements for contracts.		
13	The types of activities and resources that may need to be co-ordinated during an event.		
14	The types of problems that may occur during events and how to solve them.		
15	What points to observe when clearing and vacating an event.		
16	The purpose and value of evaluating an event and the methods you can use.		
17	The types of papers that may need to be circulated after an event.		
18	Budgetary responsibilities and procedures.		

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 FE0V 04 (S320)   Plan and Organise Meetings

Unit summary

Plan and organise meetings, ensuring the necessary activities are carried out before, during and after the meeting.

Skills

You will apply the following skills:

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

Performance indicators

You will:

Before the meeting
1   Plan and agree the meeting brief.
2   Agree a budget for the meeting, where appropriate.
3   Organise and confirm venue, equipment and catering requirements.
4   Agree and prepare agenda and meeting papers.
5   Invite attendees, confirm attendance and identify any special requirements.
6   Make sure attendees' needs are met.
7   Collate and dispatch papers for the meeting within agreed timescales.
8   Make sure the chair receives an appropriate briefing.
9   Arrange the equipment and layout of the room.
10   Arrange catering, if appropriate.
11   Make sure someone has been nominated to take minutes, if required.

At the meeting
12   Make sure attendees are welcomed and receive suitable refreshments.
13   Make sure attendees have the papers and other resources they need.
14   Provide information, advice and support when required.

After the meeting
15   Evaluate and maintain a record of external services, where these have been used.
16   Collect and evaluate participant feedback from the meeting and share the results with relevant people.
17   Agree learning points and use these to improve the organisation of future meetings.

UNIT FE0V 04 (S320)   Plan and Organise Meetings

Knowledge

You will know:

1   How to plan meetings that meet agreed aims and objectives.
2   The different types of meetings and their main features.
3   The purpose and benefits of planning and agreeing a brief for the meeting.
4   The role of the person organising the meeting.
5   How to identify suitable venues for different types of meetings.
6   The types of resources, including technology, needed for different types of meetings.
7   Health, safety and security requirements when organising meetings.
8   The main points that should be covered by an agenda and meeting papers.
9   The types of information attendees will need.
10 Any special requirements that attendees may have and how to meet them.
11 The benefits of briefing the chair in advance of the meeting.
12 The types of information, advice and support that may be asked to be provided during meetings.
13 The types of problems that may occur during meetings and how to solve these.
14 How to record and follow up actions.
15 How to evaluate external services.
16 Different ways to collect and evaluate participant feedback from the meeting.
17 How to agree learning points to improve the organisation of future meetings.

UNIT FE0V 04 (S320)   Plan and Organise Meetings

Record of evidence

Performance indicators	Evidence numbers	Evidence type
Before the meeting		
1 Plan and agree the meeting brief.		
2 Agree a budget for the meeting, where appropriate.		
3 Organise and confirm venue, equipment and catering requirements.		
4 Agree and prepare agenda and meeting papers.		
5 Invite attendees, confirm attendance and identify any special requirements.		
6 Make sure attendees' needs are met.		
7 Collate and dispatch papers for the meeting within agreed timescales.		
8 Make sure the chair receives an appropriate briefing.		
9 Arrange the equipment and layout of the room.		
10 Arrange catering, if appropriate.		
11 Make sure someone has been nominated to take minutes, if required.		
At the meeting		
12 Make sure attendees are welcomed and receive suitable refreshments.		
13 Make sure attendees have the papers and other resources they need.		
14 Provide information, advice and support when required.		
After the meeting		
15 Evaluate and maintain a record of external services, where these have been used.		
16 Collect and evaluate participant feedback from the meeting and share the results with relevant people.		
17 Agree learning points and use these to improve the organisation of future meetings.		

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

UNIT FE0V 04 (S320)   Plan and Organise Meetings

	Knowledge requirements	Evidence numbers	Evidence type
1	How to plan meetings that meet agreed aims and objectives.		
2	The different types of meetings and their main features.		
3	The purpose and benefits of planning and agreeing a brief for the meeting.		
4	The role of the person organising the meeting.		
5	How to identify suitable venues for different types of meetings.		
6	The types of resources, including technology, needed for different types of meetings.		
7	Health, safety and security requirements when organising meetings.		
8	The main points that should be covered by an agenda and meeting papers.		
9	The types of information attendees will need.		
10	Any special requirements that attendees may have and how to meet them.		
11	The benefits of briefing the chair in advance of the meeting.		
12	The types of information, advice and support that may be asked to be provided during meetings.		
13	The types of problems that may occur during meetings and how to solve these.		
14	How to record and follow up actions.		
15	How to evaluate external services.		
16	Different ways to collect and evaluate participant feedback from the meeting.		
17	How to agree learning points to improve the organisation of future.		

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 FE0G 04 (S316)   Monitor Information Systems

Unit summary

Monitor and maintain information systems to meet agreed specifications within legislation and organisational requirements.

Skills

You will apply the following skills:

♦   Analysing.
♦   Developing others.
♦   Evaluating.
♦   Monitoring.
♦   Organising.
♦   Planning resources.
♦   Negotiating.
♦   Using technology.
♦   Problem solving.
♦   Researching.

Performance indicators

You will:

1   Identify the information to be monitored and the resources available to do so.
2   Provide training and ongoing support to users.
3   Maintain and update the information system.
4   Monitor the use of the information system.
5   Resolve problems when they occur.
6   Review and further develop information systems to meet agreed specifications.
7   Make sure all relevant legal and organisational requirements are followed.

Knowledge

You will know:

1   The different ways of monitoring use of an information system.
2   The benefits of training users on the information system.
3   The purpose of maintaining and updating the information system and methods you can use.
4   The types of problems that occur with information systems and how to deal with them.
5   The benefits of continuously improving information systems.
6   Legislation and organisational requirements covering data protection and freedom of information.

UNIT FE0G 04 (S316)   Monitor Information Systems

Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Identify the information to be monitored and the resources available to do so.		
2 Provide training and ongoing support to users.		
3 Maintain and update the information system.		
4 Monitor the use of the information system.		
5 Resolve problems when they occur.		
6 Review and further develop information systems to meet agreed specifications.		
7 Make sure all relevant legal and organisational requirements are followed.		

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 monitoring use of an information system.		
2 The benefits of training users on the information system.		
3 The purpose of maintaining and updating the information system and methods you can use.		
4 The types of problems that occur with information systems and how to deal with them.		
5 The benefits of continuously improving information systems.		
6 Legislation and organisational requirements covering data protection and freedom of 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 FE0H 04 (S317)   Analyse and Report Data

Unit summary

Select, organise, analyse and report data.

Skills

You will apply the following skills:

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

Performance indicators

You will:

1   Agree the aims and objectives of the research and the deadline for the analysis.
2   Select relevant, valid and reliable data for analysis.
3   Organise data for analysis.
4   Apply analysis and evaluation techniques appropriate to the purpose of the research.
5   Produce accurate, unbiased results and conclusions.
6   Check the accuracy of the analysis using appropriate techniques and make adjustments where necessary.
7   Get feedback on what you have found, if necessary.
8   Present data on time and in the agreed format.

Knowledge

You will know:

1   The differences between primary and secondary research methods.
2   The differences between quantitative and qualitative research methods.
3   Relevant data sources and search methods.
4   How to evaluate the relevance and reliability of the sources of data.
5   What constitutes relevant, valid and reliable data.
6   How to organise data for analysis.
7   Analysis and evaluation techniques which produce accurate and unbiased results.
8   The different formats that may be required when reporting data.

UNIT FE0H 04 (S317)   Analyse and Report Data

Record of evidence

Performance indicators		Evidence numbers	Evidence type
1	Agree the aims and objectives of the research and the deadline for the analysis.		
2	Select relevant, valid and reliable data for analysis.		
3	Organise data for analysis.		
4	Apply analysis and evaluation techniques appropriate to the purpose of the research.		
5	Produce accurate, unbiased results and conclusions.		
6	Check the accuracy of the analysis using appropriate techniques and make adjustments where necessary.		
7	Get feedback on what you have found, if necessary.		
8	Present data on time and in the agreed format.		

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 differences between primary and secondary research methods.		
2	The differences between quantitative and qualitative research methods.		
3	Relevant data sources and search methods.		
4	How to evaluate the relevance and reliability of the sources of data.		
5	What constitutes relevant, valid and reliable data.		
6	How to organise data for analysis.		
7	Analysis and evaluation techniques which produce accurate and unbiased results.		
8	The different formats that may be required when reporting data.		

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 HK2A 04 (S420)   Plan Change

Unit summary

This standard is about the planning that is needed to change processes, systems, structures, roles and culture within your work environment.

Skills

You will apply the following skills:

♦   Analysing.
♦   Communicating.
♦   Contingency planning.
♦   Decision-making.
♦   Evaluating.
♦   Influencing.
♦   Information management.
♦   Involving others.
♦   Monitoring.
♦   Negotiating.
♦   Obtaining feedback.
♦   Planning.
♦   Problem solving.
♦   Risk management.
♦   Team building.
♦   Thinking systematically.
♦   Valuing and supporting others

Performance criteria

You must be able to:

1   Engage appropriate people within your organisation and other key stakeholders in planning change.
2   Establish with key stakeholders the processes, systems, structures, roles or cultures that need to be changed.
3   Evaluate the gap between the current state and the required future state.
4   Identify and evaluate obstacles to change.
5   Develop a detailed plan to achieve the required change effectively and efficiently.
6   Agree with key stakeholders criteria against which to evaluate the success of the change process.
7   Clearly identify the roles and responsibilities of all those involved in or affected by the change.
8   Make arrangements for any necessary training and support for those involved in the change.
9   Make arrangements for the continuity of business activities during the period of change.
10 Evaluate the risks associated with the plan and develop contingency arrangements.
11 Establish how and when progress will be monitored against the plan.
12 Develop a communication strategy to keep people informed about the progress and allow them to give feedback.

UNIT HK2A 04 (S420)   Plan Change

Knowledge

You will need to know and understand:

General knowledge and understanding
1   How to engage employees and stakeholders in planning change.
2   The main models and methods for managing change effectively, and their strengths and weaknesses.
3   Effective planning techniques.
4   Theory and understanding of teams, including an understanding of team-building techniques and how to apply them.
5   How to develop and gain consensus on criteria for evaluating the success of the change process.
6   How to assess the risks and benefits associated with strategies and plans.
7   The importance of contingency planning and how to do so effectively.
8   How to make critical decisions.
9   The obstacles to change, and the techniques that deal with these.
10   Stakeholder expectations and how they influence the process.
11   The principles and methods of effective communication and how to apply them.

Industry/sector specific knowledge and understanding
12   Your organisation's current position in its sector and operating environment, compared with its main competitors, relevant to the change programme.
13   The range of information sources that are relevant to the sector, and related sectors, in which your organisation operates.
14   Current and emerging trends and developments in your sector.

Context specific knowledge and understanding
15   Individuals within your area of work, their roles, responsibilities, competences and potential.
16   The vision for the future, the reasons for change, the risks and expected benefits.
17   Your organisation's culture.
18   Business critical activities and interdependencies.
19   The factors that need to be changed, and the associated priorities and reasons.
20   Your organisation's communication channels, both formal and informal.
21   Change management frameworks and methods used in your organisation.

UNIT HK2A 04 (S420)   Plan Change

Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Engage appropriate people within your organisation and other key stakeholders in planning change.		
2 Establish with key stakeholders the processes, systems, structures, roles or cultures that need to be changed.		
3 Evaluate the gap between the current state and the required future state.		
4 Identify and evaluate obstacles to change.		
5 Develop a detailed plan to achieve the required change effectively and efficiently.		
6 Agree with key stakeholders criteria against which to evaluate the success of the change process.		
7 Clearly identify the roles and responsibilities of all those involved in or affected by the change.		
8 Make arrangements for any necessary training and support for those involved in the change.		
9 Make arrangements for the continuity of business activities during the period of change.		
10 Evaluate the risks associated with the plan and develop contingency arrangements.		
11 Establish how and when progress will be monitored against the plan.		
12 Develop a communication strategy to keep people informed about the progress and allow them to give feedback.		

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

UNIT HK2A 04 (S420)   Plan Change

	Knowledge requirements	Evidence numbers	Evidence type
1	How to engage employees and stakeholders in planning change.		
2	The main models and methods for managing change effectively, and their strengths and weaknesses.		
3	Effective planning techniques.		
4	Theory and understanding of teams, including an understanding of team-building techniques and how to apply them.		
5	How to develop and gain consensus on criteria for evaluating the success of the change process.		
6	How to assess the risks and benefits associated with strategies and plans.		
7	The importance of contingency planning and how to do so effectively.		
8	How to make critical decisions.		
9	The obstacles to change, and the techniques that deal with these.		
10	Stakeholder expectations and how they influence the process.		
11	The principles and methods of effective communication and how to apply them.		
12	Your organisation's current position in its sector and operating environment, compared with its main competitors, relevant to the change programme.		
13	The range of information sources that are relevant to the sector, and related sectors, in which your organisation operates.		
14	Current and emerging trends and developments in your sector.		
15	Individuals within your area of work, their roles, responsibilities, competences and potential.		
16	The vision for the future, the reasons for change, the risks and expected benefits.		
17	Your organisation's culture.		
18	Business critical activities and interdependencies.		
19	The factors that need to be changed, and the associated priorities and reasons.		
20	Your organisation's communication channels, both formal and informal.		
21	Change management frameworks and methods used in your organisation.		

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UNIT HK2A 04 (S420)   Plan Change

Candidate: _____   **Date:** _____

Assessor: _____   **Date:** _____

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

UNIT H98D 04 (S419) Explore Ideas for Innovation in a Business Environment

Unit summary

Implement and evaluate innovation when working in a business environment.

Skills

You will apply the following skills:

♦ Analysing.
♦ Communicating.
♦ Evaluating.
♦ Negotiating.
♦ Organising.
♦ Persuading.
♦ Planning.
♦ Problem solving.
♦ Questioning.

Performance indicators

You will:

1 Constructively question existing ways of working within the organisation.
2 Research and identify possible innovations to working methods, services or products.
3 Gather information to develop own ideas.
4 Evaluate ideas based on agreed criteria, including complying with organisational aims and objectives.
5 Identify the costs and benefits of own ideas, including the resources needed and the likely impact on others.
6 Evaluate the potential of own ideas with colleagues, including whether they have been tried before and what would be different this time.
7 Ask appropriate questions to extend own thinking and question own assumptions.
8 Communicate and sell ideas to others.
9 Take feedback into account and show a willingness to adapt.
10 Decide whether or not own ideas are viable.
11 Put forward a formal proposal to persuade decision-makers.
12 Recognise when it is appropriate to take acceptable risks.
13 Show a willingness to learn from mistakes.

UNIT H98D 04 (S419)   Explore Ideas for Innovation in a Business Environment

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Knowledge

You will know:

1   The value of innovation in staying competitive and offering new solutions to established problems.
2   How to review the status quo in a way that is likely to achieve the results you want.
3   How to research possible improvements.
4   How to evaluate ideas, including cost/benefit and impact analysis.
5   How to question assumptions to develop concepts and propositions.
6   How to communicate and sell ideas to other people.
7   How to show that ideas contributed by others are valued.
8   How to decide when an idea is, or is not, viable.
9   How to decide which decision-makers to approach and influence.
10 How to develop and document proposals.
11 Risk analysis and risk management during periods of change.
12 The value of reflecting on and learning from mistakes.

UNIT H98D 04 (S419) Explore Ideas for Innovation in a Business Environment

Record of evidence

	Performance indicators	Evidence numbers	Evidence type
1	Constructively question existing ways of working within the organisation.		
2	Research and identify possible innovations to working methods, services or products.		
3	Gather information to develop own ideas.		
4	Evaluate ideas based on agreed criteria, including complying with organisational aims and objectives.		
5	Identify the costs and benefits of own ideas, including the resources needed and the likely impact on others.		
6	Evaluate the potential of own ideas with colleagues, including whether they have been tried before and what would be different this time.		
7	Ask appropriate questions to extend own thinking and question own assumptions.		
8	Communicate and sell ideas to others.		
9	Take feedback into account and show a willingness to adapt.		
10	Decide whether or not own ideas are viable.		
11	Put forward a formal proposal to persuade decision-makers.		
12	Recognise when it is appropriate to take acceptable risks.		
13	Show a willingness to learn from mistakes.		

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

UNIT H98D 04 (S419)   Explore Ideas for Innovation in a Business Environment

Knowledge requirements	Evidence numbers	Evidence type
1 The value of innovation in staying competitive and offering new solutions to established problems.		
2 How to review the status quo in a way that is likely to achieve the results you want.		
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9 How to decide which decision-makers to approach and influence.		
10 How to develop and document proposals.		
11 Risk analysis and risk management during periods of change.		
12 The value of reflecting on and learning from mistakes.		

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Candidate: _____   **Date:** _____

Assessor: _____   **Date:** _____

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

UNIT J6X1 04 (S323)   Contribute to Innovation in a Business Environment

Unit summary

This standard is about contributing to innovation in a business environment. It includes generating, developing and evaluating ideas for innovation in a business environment. It also covers identifying and researching possible ways of improving working practices, products or services, evaluating the ideas and adapting them based on the feedback received.

It is for professionals in business administration roles who are involved in making contributions to innovation.

Skills

You will apply the following skills:

♦ Analysing.
♦ Communicating.
♦ Evaluating.
♦ Negotiating.
♦ Organising.
♦ Persuading.
♦ Planning.
♦ Problem solving.
♦ Questioning.
♦ Reviewing.
♦ Risk analysis.

Performance criteria

You must be able to:

1   Analyse the current working practices within the organisation.
2   Research and identify possible innovations of working methods, services or products.
3   Collate information to support the innovation with your own ideas.
4   Evaluate your ideas against the agreed criteria and organisational aims and objectives.
5   Identify the costs and benefits of your ideas and analyse their impact on working methods, services or products.
6   Carry out a risk analysis of your ideas.
7   Assess own ideas' competitiveness.
8   Question your own ideas and assumptions to develop concepts and propositions.
9   Evaluate the potential of your ideas with colleagues and team members, identifying the required improvements.
10   Communicate and promote your ideas to colleagues and team members.
11   Develop a formal proposal to influence the stakeholders and decision-makers.
12   Collate the feedback and review your ideas and working practices.
13   Improve your ideas and working practices from lessons learned.

UNIT J6X1 04 (S323)   Contribute to Innovation in a Business Environment

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Knowledge

You need to know and understand:

1   The current working practices within the organisation.
2   The range of working methods, services or products at your organisation.
3   How to research possible improvements to support the innovation.
4   The value of innovation and new solutions to the current issues.
5   How to evaluate ideas, including cost, benefit and impact analysis.
6   The methods of carrying out the risk analysis.
7   How to assess the competitiveness of your ideas.
8   How to question your ideas and assumptions to develop concepts and propositions.
9   The relevant methods of evaluation of your ideas and how to implement improvements.
10   How to communicate and promote your ideas and working practices.
11   How to develop and document proposals.
12   How to collate feedback to review your ideas and working practices.
13   The value of reflection based on lessons learned.

UNIT J6X1 04 (S323)   Contribute to Innovation in a Business Environment

Record of evidence

Performance indicators		Evidence numbers	Evidence type
1	Analyse the current working practices within the organisation.		
2	Research and identify possible innovations of working methods, services or products.		
3	Collate information to support the innovation with your own ideas.		
4	Evaluate your ideas against the agreed criteria and organisational aims and objectives.		
5	Identify the costs and benefits of your ideas and analyse their impact on working methods, services or products.		
6	Carry out a risk analysis of your ideas.		
7	Assess own ideas' competitiveness.		
8	Question your own ideas and assumptions to develop concepts and propositions.		
9	Evaluate the potential of your ideas with colleagues and team members, identifying the required improvements.		
10	Communicate and promote your ideas to colleagues and team members.		
11	Develop a formal proposal to influence the stakeholders and decision-makers.		
12	Collate the feedback and review your ideas and working practices.		
13	Improve your ideas and working practices from lessons learned.		

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

UNIT J6X1 04 (S323)   Contribute to Innovation in a Business Environment

Knowledge requirements		Evidence numbers	Evidence type
1	The current working practices within the organisation.		
2	The range of working methods, services or products at your organisation.		
3	How to research possible improvements to support the innovation.		
4	The value of innovation and new solutions to the current issues.		
5	How to evaluate ideas, including cost, benefit and impact analysis.		
6	The methods of carrying out the risk analysis.		
7	How to assess the competitiveness of your ideas.		
8	How to question your ideas and assumptions to develop concepts and propositions.		
9	The relevant methods of evaluation of your ideas and how to implement improvements.		
10	How to communicate and promote your ideas and working practices.		
11	How to develop and document proposals.		
12	How to collate feedback to review your ideas and working practices.		
13	The value of reflection based on lessons learned.		

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 FE0W 04 (S321)   Organise Business Travel or Accommodation

Unit summary

Research, organise and agree arrangements for travel and accommodation to make sure they meet the brief and agreed budget.

Skills

You will apply the following skills:

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

Performance indicators

You will:

1   Confirm travel or accommodation and budget requirements.
2   Check draft itinerary and schedule with the traveller.
3   Research and book travel arrangements or accommodation as agreed, obtaining best value for money.
4   Obtain foreign currency, relevant insurance and visas, if required.
5   Obtain and collate documents and information for travel or accommodation.
6   Maintain records of travel or accommodation and store any confidential information securely, including financial records.
7   Arrange payment facilities for travel or accommodation.
8   Follow the correct procedures when there are problems with travel or accommodation arrangements.
9   Provide the traveller with an itinerary, documents and information in good time.
10 Confirm with the traveller that itinerary, documents and information meet requirements.
11 Evaluate and maintain a record of external services used.

UNIT FE0W 04 (S321) Organise Business Travel or Accommodation

Knowledge

You will know:

1   The purpose of confirming the brief and budget for travel or accommodation.
2   How to organise business travel or accommodation to meet expectations.
3   The main types of 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 travel or accommodation arrangements.
5   How to obtain best value for money when making travel or accommodation arrangements.
6   How to obtain foreign currency, insurance and visas and when these are required.
7   How to keep records of travel or accommodation arrangements, including financial records.
8   The types of information that are confidential and how to store them in line with current legislation.
9   The documents and information to provide to the person who is travelling and how to obtain these.
10   The procedures to follow to make payment arrangements for travel or accommodation.
11   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.
12   The purpose of evaluating the travel or accommodation used and recording the findings of the evaluation for future application.

UNIT FE0W 04 (S321)   Organise Business Travel or Accommodation

Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Confirm travel or accommodation and budget requirements.		
2 Check draft itinerary and schedule with the traveller.		
3 Research and book travel arrangements or accommodation as agreed, obtaining best value for money.		
4 Obtain foreign currency, relevant insurance and visas, if required.		
5 Obtain and collate documents and information for travel or accommodation.		
6 Maintain records of travel or accommodation and store any confidential information securely, including financial records.		
7 Arrange payment facilities for travel or accommodation.		
8 Follow the correct procedures when there are problems with travel or accommodation arrangements.		
9 Provide the traveller with an itinerary, documents and information in good time.		
10 Confirm with the traveller that itinerary, documents and information meet requirements.		
11 Evaluate and maintain a record of external services used.		

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

UNIT FE0W 04 (S321) Organise 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 organise business travel or accommodation to meet expectations.		
3	The main types of 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 travel or accommodation arrangements.		
5	How to obtain best value for money when making travel or accommodation arrangements.		
6	How to obtain foreign currency, insurance and visas and when these are required.		
7	How to keep records of travel or accommodation arrangements, including financial records.		
8	The types of information that are confidential and how to store them in line with current legislation.		
9	The documents and information to provide to the person who is travelling and how to obtain these.		
10	The procedures to follow to make payment arrangements for travel or accommodation.		
11	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.		
12	The purpose of evaluating the travel or accommodation used and recording the findings of the evaluation for future application		

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

UNIT J6X2 04 (S325)   Deliver and Evaluate Customer Services

Record of evidence

Performance indicators	Evidence numbers	Evidence type
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.		
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.		
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.		

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

UNIT J6X2 04 (S325)   Deliver and Evaluate Customer Services

Knowledge requirements	Evidence numbers	Evidence type
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: _____   **Date:** _____
(if sampled)

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:** _____

Assessor: _____ **Date:** _____

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

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: _____ **Date:** _____

Assessor: _____ **Date:** _____

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

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
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.		

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.		
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.		

UNIT FE0M 04 (S329)   Provide Administrative Support in Schools

Knowledge requirements	Evidence numbers	Evidence type
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: _____   **Date:** _____
(if sampled)

UNIT FE08 04 (S322)   Supervise an Office Facility

Unit summary

Maintain office equipment, resources and facilities to meet the needs of office users.

Skills

You will apply the following skills:

♦ Checking.
♦ Communicating.
♦ Developing others.
♦ Evaluating.
♦ Interpersonal skills.
♦ Managing time.
♦ Negotiating.
♦ Planning.
♦ Monitoring.
♦ Problem solving.
♦ Organising.
♦ Prioritising.

Performance indicators

You will:

1 Identify and agree the needs of office facility users.
2 Maintain office facilities and equipment to meet the needs of users and keep within agreed budget(s).
3 Supervise the use of office resources.
4 Use and review office systems and procedures.
5 Make sure office equipment is working efficiently.
6 Identify office facilities and equipment in need of repair or replacement.
7 Build and maintain relationships with suppliers.
8 Contribute to reviewing the office environment in line with health, safety and security policy.
9 Resolve problems in a timely manner.
10 Provide information and guidance on office facilities.
11 Communicate priorities to office facility users.
12 Monitor the use of office facilities.

UNIT FE08 04 (S322)   Supervise an Office Facility

Knowledge

You will know:

1. The range of office facilities, equipment and resources and what they can be used for.
2. The purpose and value of identifying and regularly reviewing the needs of office users and methods used.
3. How to identify office facilities and equipment in need of repair or replacement.
4. The types of office systems and procedures appropriate to own responsibilities.
5. The purpose and benefits of building relationships with suppliers, and how to do so.
6. Why health, safety and security are important to an office environment.
7. The main health, safety and security requirements that are important to an office environment.
8. The types of problems that arise when supervising an office facility and how to deal with them.
9. The purpose and benefits of monitoring office facilities and the types of activities to monitor.

UNIT FE08 04 (S322)   Supervise an Office Facility

Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Identify and agree the needs of office facility users.		
2 Maintain office facilities and equipment to meet the needs of users and keep within agreed budget(s).		
3 Supervise the use of office resources.		
4 Use and review office systems and procedures.		
5 Make sure office equipment is working efficiently.		
6 Identify office facilities and equipment in need of repair or replacement.		
7 Build and maintain relationships with suppliers.		
8 Contribute to reviewing the office environment in line with health, safety and security policy.		
9 Resolve problems in a timely manner.		
10 Provide information and guidance on office facilities.		
11 Communicate priorities to office facility users.		
12 Monitor the use of office facilities.		

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

UNIT FE08 04 (S322)   Supervise an Office Facility

Knowledge requirements	Evidence numbers	Evidence type
1 The range of office facilities, equipment and resources and what they can be used for.		
2 The purpose and value of identifying and regularly reviewing the needs of office users and methods used.		
3 How to identify office facilities and equipment in need of repair or replacement.		
4 The types of office systems and procedures appropriate to own responsibilities.		
5 The purpose and benefits of building relationships with suppliers, and how to do so.		
6 Why health, safety and security are important to an office environment.		
7 The main health, safety and security requirements that are important to an office environment.		
8 The types of problems that arise when supervising an office facility and how to deal with them.		
9 The purpose and benefits of monitoring office facilities and the types of activities to monitor.		

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 FE0J 04 (S318)   Order Products and Services

Unit summary

Identify and obtain relevant products and services to meet agreed specifications as negotiated with suppliers to achieve best value for money.

Skills

You will apply the following skills:

♦   Communicating.
♦   Evaluating.
♦   Monitoring.
♦   Negotiating.
♦   Problem solving.
♦   Researching.

Performance indicators

You will:

1   Keep up to date with products and services relevant to own area of work.
2   Develop and agree a budget and specification for the products or services to be ordered.
3   Identify quality products and services that meet the specification.
4   Identify the product or service which represents best value for money.
5   Procure products or services following organisational procedures.
6   Negotiate with selected suppliers to reach an agreement which offers good value for money and is acceptable to both parties.
7   Agree a contract for the product or service, if required.
8   Create and maintain partnerships with suppliers to improve quality and cut costs.
9   Monitor the performance of suppliers in line with the terms of the contract.
10   Follow the correct procedures to deal with problems.
11   Monitor and evaluate procurement procedures as needed.
12   Take action to improve efficiency and obtain better value for money.

UNIT FE0J 04 (S318)   Order Products and Services

Knowledge

You will know:

1 The organisational needs and priorities regarding procurement.
2 Sources of information on products and services relevant to own area of work and how to use these.
3 How to write a specification for a product or service.
4 Different sources of quality products and services.
5 How to select products and services that represent best value for money.
6 How to negotiate best value for money.
7 The organisational procurement procedures, including its policy on the acceptance of gifts and hospitality.
8 How to create and maintain positive working partnerships with suppliers.
9 How supply chains work.
10 How to monitor and evaluate procurement procedures.
11 The actions that may improve efficiency and obtain better value for money.

UNIT FE0J 04 (S318)   Order Products and Services

Record of evidence

Performance indicators		Evidence numbers	Evidence type
1	Keep up to date with products and services relevant to own area of work.		
2	Develop and agree a budget and specification for the products or services to be ordered.		
3	Identify quality products and services that meet the specification.		
4	Identify the product or service which represents best value for money.		
5	Procure products or services following organisational procedures.		
6	Negotiate with selected suppliers to reach an agreement which offers good value for money and is acceptable to both parties.		
7	Agree a contract for the product or service, if required.		
8	Create and maintain partnerships with suppliers to improve quality and cut costs.		
9	Monitor the performance of suppliers in line with the terms of the contract.		
10	Follow the correct procedures to deal with problems.		
11	Monitor and evaluate procurement procedures as needed.		
12	Take action to improve efficiency and obtain better value for money.		

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

UNIT FE0J 04 (S318)   Order Products and Services

Knowledge requirements		Evidence numbers	Evidence type
1	The organisational needs and priorities regarding procurement.		
2	Sources of information on products and services relevant to own area of work and how to use these.		
3	How to write a specification for a product or service.		
4	Different sources of quality products and services.		
5	How to select products and services that represent best value for money.		
6	How to negotiate best value for money.		
7	The organisational procurement procedures, including its policy on the acceptance of gifts and hospitality.		
8	How to create and maintain positive working partnerships with suppliers.		
9	How supply chains work.		
10	How to monitor and evaluate procurement procedures.		
11	The actions that may improve efficiency and obtain better value for money.		

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 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
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.		

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

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.

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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.

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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
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.		

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 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
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.		

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

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 you 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
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 you 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.		

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

UNIT H68K 04 (S416)   Manage Budgets

Unit summary

Manage the budget for your area of responsibility or for specific projects or activities.

Skills

You will apply the following skills:

♦ Acting assertively.
♦ Communicating.
♦ Consulting.
♦ Contingency planning.
♦ Decision-making.
♦ Evaluating.
♦ Information management.
♦ Learning.
♦ Monitoring.
♦ Negotiating.
♦ Presenting information.
♦ Problem solving.
♦ Reporting.

Performance indicators

You will:

1 Engage appropriate colleagues and other key stakeholders in managing budgets.
2 Gather and evaluate information to prepare a realistic budget for your area of responsibility, activity or project.
3 Submit your proposed budget for approval by those with decision-making responsibility for budgets, clearly specifying assumptions made, risks involved and how these will be managed.
4 Discuss and, if appropriate, negotiate the proposed budget with those with decision-making responsibility and agree the final budget.
5 Use the agreed budget to actively monitor and control performance for your area of responsibility, activity or project.
6 Identify the causes of any significant variances between what was budgeted and what actually happened and take prompt corrective action, obtaining agreement from those with decision-making responsibility, if required.
7 Propose revisions to the budget, if necessary, in response to variances and/or significant or unforeseen developments and discuss and agree the revisions with those with decision-making responsibility.
8 Provide ongoing information on performance against the budget to those with decision-making responsibility.
9 Advise relevant people promptly if you have identified evidence of potentially fraudulent activities.
10 Gather information from implementation of the budget to assist in the preparation of future budgets.

UNIT H68K 04 (S416)   Manage Budgets

Knowledge

You will know:

General knowledge and understanding
1   How to engage colleagues and stakeholders in managing budgets.
2   The purposes of budgetary systems.
3   Where to get and how to evaluate the available information in order to be able to prepare a realistic budget.
4   How to discuss, negotiate and confirm a budget with those with budgetary responsibility and the key factors that should be covered.
5   How to use a budget to actively monitor and control performance for a defined area or activity of work.
6   The main causes of variances and how to identify them.
7   What different types of corrective action which could be taken to address identified variances.
8   How unforeseen developments can affect a budget and how to deal with them.
9   The importance of agreeing revisions to the budget and communicating the changes.
10 The importance of providing regular information on performance against the budget to other people.
11 Types of fraudulent activities and how to identify them.
12 The importance of using the implementation of the budget to identify information and lessons for the preparation of future budgets.

Industry/sector specific knowledge and understanding
13 Factors, trends and developments that are likely to affect the setting of budgets in your industry/sector.

Context specific knowledge and understanding
14 The area or activity that the budget is for.
15 The vision, objectives and operational plans for your area of responsibility.
16 The budgeting periods used in your organisation.
17 Organisational guidelines and procedures for the preparation and approval of budgets and for monitoring and reporting of performance against budgets and revising budgets.
18 The agreed budget, how it can be used and how much it can be changed without approval.
19 The limits of your authority.
20 Who needs information in your organisation about performance against your budget, what information they need, when they need it and in what format.
21 What to do and who to contact if you suspect fraud has been committed.

UNIT H68K 04 (S416)   Manage Budgets

Record of evidence

	Performance indicators	Evidence numbers	Evidence type
1	Engage appropriate colleagues and other key stakeholders in managing budgets.		
2	Gather and evaluate information to prepare a realistic budget for your area of responsibility, activity or project.		
3	Submit your proposed budget for approval by those with decision-making responsibility for budgets, clearly specifying assumptions made, risks involved and how these will be managed.		
4	Discuss and, if appropriate, negotiate the proposed budget with those with decision-making responsibility and agree the final budget.		
5	Use the agreed budget to actively monitor and control performance for your area of responsibility, activity or project.		
6	Identify the causes of any significant variances between what was budgeted and what actually happened and take prompt corrective action, obtaining agreement from those with decision-making responsibility, if required.		
7	Propose revisions to the budget, if necessary, in response to variances and/or significant or unforeseen developments and discuss and agree the revisions with those with decision-making responsibility.		
8	Provide ongoing information on performance against the budget to those with decision-making responsibility.		
9	Advise relevant people promptly if you have identified evidence of potentially fraudulent activities.		
10	Gather information from implementation of the budget to assist in the preparation of future budgets		

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

UNIT H68K 04 (S416)   Manage Budgets

Knowledge requirements	Evidence numbers	Evidence type
General knowledge and understanding		
1 How to engage colleagues and stakeholders in managing budgets.		
2 The purposes of budgetary systems.		
3 Where to get and how to evaluate the available information in order to be able to prepare a realistic budget.		
4 How to discuss, negotiate and confirm a budget with those with budgetary responsibility and the key factors that should be covered.		
5 How to use a budget to actively monitor and control performance for a defined area or activity of work.		
6 The main causes of variances and how to identify them.		
7 What different types of corrective action which could be taken to address identified variances.		
8 How unforeseen developments can affect a budget and how to deal with them.		
9 The importance of agreeing revisions to the budget and communicating the changes.		
10 The importance of providing regular information on performance against the budget to other people.		
11 Types of fraudulent activities and how to identify them.		
12 The importance of using the implementation of the budget to identify information and lessons for the preparation of future budgets.		
Industry/sector specific knowledge and understanding		
13 Factors, trends and developments that are likely to affect the setting of budgets in your industry/sector.		
Context specific knowledge and understanding		
14 The area or activity that the budget is for.		
15 The vision, objectives and operational plans for your area of responsibility.		
16 The budgeting periods used in your organisation.		

UNIT H68K 04 (S416)   Manage Budgets

Knowledge requirements (cont)	Evidence numbers	Evidence type
17 Organisational guidelines and procedures for the preparation and approval of budgets and for monitoring and reporting of performance against budgets and revising budgets		
18 The agreed budget, how it can be used and how much it can be changed without approval.		
19 The limits of your authority.		
20 Who needs information in your organisation about performance against your budget, what information they need, when they need it and in what format.		
21 What to do and who to contact if you suspect fraud has been committed.		

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
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.		

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 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
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.		

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
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.		

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 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
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.		

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

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

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: _____   **Date:** _____

Assessor: _____   **Date:** _____

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

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

APP40		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:** _____

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

UNIT J6XA 04 (S211b) Produce and Process Documents

Unit summary

This standard is about the processing of documentation to the required organisational standards. It is about identifying, gathering and validating the required information and producing and circulating final documents to the relevant colleagues, clients and stakeholders.

Performance criteria

You must be able to:

1 Establish the purpose of the required documents and what they must contain.
2 Identify and locate the required information for the documents.
3 Gather and collate the relevant information to be processed.
4 Take the required action when the relevant information is not available.
5 Confirm that the accuracy and validity of the required information is not available.
6 Follow organisational procedures and the relevant data protection legislation for maintaining the confidentiality of the required information.
7 Follow your organisational procedures for the processing of the required information.
8 Collate and produce documents to meet your organisational standards.
9 Forward documentation to the relevant colleagues, clients and stakeholders within the timescales outlined in your organisational standards.
10 Archive documents following the organisational procedures.

Knowledge and understanding

You need to know and understand:

1 The purpose of the documents and their intended audience.
2 The nature of the information required.
3 The different sources of information and how they can be accessed.
4 The actions to be taken if the required information cannot be accessed.
5 Your organisational standards for the accuracy and validity of the information.
6 The methods of confirming the confidentiality of the information obtained and that it meets your organisational standards and the relevant data protection legislation.
7 The ways of rectifying incomplete or inaccurate information the ways of rectifying incomplete or inaccurate information.
8 How to collate and produce information in the required organisational format.
9 The organisational procedures for circulating documents.
10 The organisational procedures for the processing, archiving and retrieval of documents.

UNIT J6XA 04 (S211b)   Produce and Process Documents

Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Establish the purpose of the required documents and what they must contain.		
2 Identify and locate the required information for the documents.		
3 Gather and collate the relevant information to be processed		
4 Take the required action when the relevant information is not available.		
5 Confirm that the accuracy and validity of the required information is not available.		
6 Follow organisational procedures and the relevant data protection legislation for maintaining the confidentiality of the required information.		
7 Follow your organisational procedures for the processing of the required information.		
8 Collate and produce documents to meet your organisational standards.		
9 Forward documentation to the relevant colleagues, clients and stakeholders within the timescales outlined in your organisational standards.		
10 Archive documents following the organisational procedures.		

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

UNIT J6XA 04 (S211b) Produce and Process Documents

Knowledge requirements	Evidence numbers	Evidence type
1 The purpose of the documents and their intended audience.		
2 The nature of the information required.		
3 The different sources of information and how they can be accessed.		
4 The actions to be taken if the required information cannot be accessed.		
5 Your organisational standards for the accuracy and validity of the information.		
6 The methods of confirming the confidentiality of the information obtained and that it meets your organisational standards and the relevant data protection legislation.		
7 The ways of rectifying incomplete or inaccurate information the ways of rectifying incomplete or inaccurate information.		
8 How to collate and produce information in the required organisational format.		
9 The organisational procedures for circulating documents.		
10 The organisational procedures for the processing, archiving and retrieval of documents.		

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 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
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.		

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 orgonsational 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 orgonsational 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 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: _____ **Date:** _____
(if sampled)

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: _____ **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:** _____

Assessor: _____ **Date:** _____

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

UNIT J6WS 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.
13   Report problems that you cannot deal with to the appropriate colleague.

UNIT J6WS 04 (S112)   Use Office Equipment in Accordance with Occupational Regulations and Safety Guidelines

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Performance criteria (continued)

You will:

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.

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.

UNIT J6WS 04 (S112)   Use Office Equipment in Accordance with Occupational Regulations and Safety Guidelines

Record of evidence

Performance indicators	Evidence numbers	Evidence type
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.		
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.		

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

UNIT J6WS 04 (S112) Use Office Equipment in Accordance with Occupational Regulations and Safety Guidelines

Knowledge requirements	Evidence numbers	Evidence type
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.

UNIT J6WS 04 (S112)   Use Office Equipment in Accordance with Occupational Regulations and Safety Guidelines

Candidate: _____   **Date:** _____

Assessor: _____   **Date:** _____

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

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.		

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 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:** _____

Assessor: _____   **Date:** _____

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

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:** _____

Assessor: _____   **Date:** _____

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

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
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.		

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.		

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 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
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.		

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: _____   **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

Record of evidence

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

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.		

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

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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
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.		
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.		

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
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

Knowledge requirements	Evidence numbers	Evidence type
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.		

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 H987 04 (S3071)   Allocate Work to Team Members

Unit summary

Ensure that the work required of your team is effectively and fairly allocated amongst team members.

Skills

You will apply the following skills:

♦   Communicating
♦   Decision-making
♦   Delegating
♦   Empowering
♦   Information management
♦   Leading by example
♦   Monitoring
♦   Planning
♦   Presenting information
♦   Prioritising
♦   Problem solving
♦   Reporting
♦   Setting objectives
♦   Team building
♦   Time management
♦   Valuing and supporting others

Performance indicators

You will:

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

    (i)   their skills, knowledge and competence
    (ii) their backgrounds and experience,
    (iii) their existing workloads, and
    (iv) opportunities for their development.

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

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UNIT H987 04 (S3071)   Allocate Work to Team Members

Knowledge

You will know:

General knowledge and understanding
1   Different ways of communicating effectively with members of a team.
2   The importance of confirming/clarifying the work required of the team with your manager and how to do this effectively.
3   How to plan the work of a team, including how to identify any priorities or critical activities and the available resources.
4   Why it is important to allocate work across the team on a fair basis and how to do so.
5   Why it is important to brief team members on the work they have been allocated and the standard or level of expected performance and how to do so.
6   Ways of encouraging team members to ask questions and/or seek clarification and make suggestions in relation to the work which they have been allocated.
7   Concerns team members may have about their work and how to address these concerns.

Industry/sector specific knowledge and understanding
8   Industry/sector specific legislation, regulations, guidelines, codes of practice relating to carrying out work.
9   Industry/sector requirements for the development or maintenance of knowledge, skills and competence.

Context specific knowledge and understanding
10   The purpose and objectives of your team.
11   The work required of your team.
12   The available resources for undertaking the required work.
13   Your team's plan for undertaking the required work.
14   The knowledge, skills, competence and workloads of team members.
15   The backgrounds and experience of team members.
16   Team members' existing workloads.
17   Opportunities for team members' development.
18   Your organisation's policy and procedures for personal and professional development.
19   Reporting lines in the organisation and the limits of your authority.
20   Your organisation's standards or levels of expected performance.

UNIT H987 04 (S3071)   Allocate Work to Team Members

Record of evidence

Performance indicators	Evidence numbers	Evidence type
1 Confirm the work required of the team with your manager and seek clarification, where necessary, on any outstanding points and issues.		
2 Plan how the team will undertake its work, identifying any priorities or critical activities and making effective use of the available resources.		
3 Allocate work to team members on a fair basis taking account of:		
(i) Their skills, knowledge and competence		
(ii) Their backgrounds and experience,		
(iii) Their existing workloads, and		
(iv) Opportunities for their development.		
4 Brief team members on the work they have been allocated and the standard of performance expected.		
5 Encourage team members to ask questions, make suggestions and seek clarification in relation to the work they have been allocated.		
6 Address any concerns team members may have about their work		

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

UNIT H987 04 (S3071)   Allocate Work to Team Members

Knowledge requirements	Evidence numbers	Evidence type
General knowledge and understanding		
1 Different ways of communicating effectively with members of a team.		
2 The importance of confirming/clarifying the work required of the team with your manager and how to do this effectively.		
3 How to plan the work of a team, including how to identify any priorities or critical activities and the available resources.		
4 Why it is important to allocate work across the team on a fair basis and how to do so.		
5 Why it is important to brief team members on the work they have been allocated and the standard or level of expected performance and how to do so.		
6 Ways of encouraging team members to ask questions and/or seek clarification and make suggestions in relation to the work which they have been allocated.		
7 Concerns team members may have about their work and how to address these concerns.		
Industry/sector specific knowledge and understanding		
8 Industry/sector specific legislation, regulations, guidelines, codes of practice relating to carrying out work.		
9 Industry/sector requirements for the development or maintenance of knowledge, skills and competence.		
Context specific knowledge and understanding		
10 The purpose and objectives of your team.		
11 The work required of your team.		
12 The available resources for undertaking the required work.		
13 Your team's plan for undertaking the required work.		
14 The knowledge, skills, competence and workloads of team members.		
15 The backgrounds and experience of team members.		
16 Team members' existing workloads.		
17 Opportunities for team members' development.		

UNIT H987 04 (S3071)   Allocate Work to Team Members

Knowledge requirements (cont)		Evidence numbers	Evidence type
18	Your organisation's policy and procedures for personal and professional development.		
19	Reporting lines in the organisation and the limits of your authority.		
20	Your organisation's standards or levels of expected performance.		

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 H988 04 (S3072)   Quality Assure Work in Your Team

Unit summary

Check on the progress and quality of the work of the team members to ensure that the required standard of performance is being met.

Skills

You will apply the following skills:

♦ Communicating
♦ Managing conflict
♦ Monitoring
♦ Motivating
♦ Problem solving
♦ Providing feedback
♦ Reviewing
♦ Team building
♦ Valuing and supporting others

Performance indicators

You will:

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

UNIT H988 04 (S3072)   Quality Assure Work in Your Team

Knowledge

You will know:

General knowledge and understanding
1   Effective ways of regularly and fairly checking the progress and quality of the work of team members.
2   How to provide prompt and constructive feedback to team members.
3   How to select and apply different methods for motivating, supporting and encouraging team members to complete the work they have been allocated and continuously improve their performance.
4   How to select and apply different methods for recognising team members' achievements.
5   The additional support and/or resources which team members might require to help them complete their work on time and to the standard required and how to assist in providing this.

Industry/sector specific knowledge and understanding
6   Industry/sector specific legislation, regulations, guidelines, codes of practice relating to carrying out work.

Context specific knowledge and understanding
7   Your team's plan for undertaking the required work.
8   The knowledge, skills, competence, roles and workloads of team members.
9   Your organisation's policy and procedures in terms of personal and professional development.
10 Reporting lines in your organisation and the limits of your authority.
11 Your organisation's standards or levels of expected performance.
12 Your organisation's policies and procedures for dealing with poor performance.
13 Your organisation's grievance and disciplinary policies and procedures.
14 Your organisation's performance appraisal systems.

UNIT H988 04 (S3072)   Quality Assure Work in Your Team

Record of evidence

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

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

UNIT H988 04 (S3072)   Quality Assure Work in Your Team

Knowledge requirements	Evidence numbers	Evidence type
General knowledge and understanding		
1 Effective ways of regularly and fairly checking the progress and quality of the work of team members.		
2 How to provide prompt and constructive feedback to team members.		
3 How to select and apply different methods for motivating, supporting and encouraging team members to complete the work they have been allocated and continuously improve their performance.		
4 How to select and apply different methods for recognising team members' achievements.		
5 The additional support and/or resources which team members might require to help them complete their work on time and to the standard required and how to assist in providing this.		
Industry/sector specific knowledge and understanding		
6 Industry/sector specific legislation, regulations, guidelines, codes of practice relating to carrying out work.		
Context specific knowledge and understanding		
7 Your team's plan for undertaking the required work.		
8 The knowledge, skills, competence, roles and workloads of team members.		
9 Your organisation's policy and procedures in terms of personal and professional development.		
10 Reporting lines in your organisation and the limits of your authority.		
11 Your organisation's standards or levels of expected performance.		
12 Your organisation's policies and procedures for dealing with poor performance.		
13 Your organisation's grievance and disciplinary policies and procedures.		
14 Your organisation's performance appraisal systems.		

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 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   Asses 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
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 Asses 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
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.		

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

Knowledge requirements		Evidence numbers	Evidence type
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
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.		

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
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.		

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

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

Performance indicators	Evidence numbers	Evidence type
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.		

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
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.		

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: **Date:**
(if sampled)

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
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.		

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
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.		

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

UNIT FD9G 04 (S227)   Administer HR Records

Candidate: _____   **Date:** _____

Assessor: _____   **Date:** _____

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

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 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: _____   **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 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
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.		

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

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
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.		

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

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
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.		

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
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.		

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
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.		

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:** _____

Assessor: _____   **Date:** _____

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
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.		

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.

Candidate: _____   **Date:** _____

Assessor: _____   **Date:** _____

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

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
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.		

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.

Candidate: _____   **Date:** _____

Assessor: _____   **Date:** _____

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

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
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.		

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:　　　　　　　　　　　　　　　**Date:**
(if sampled)

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
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.		

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: _____   **Date:** _____

Assessor: _____   **Date:** _____

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

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
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.		

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.		

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 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
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 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.		

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 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
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 multipage and multi-section 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.		

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

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
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.		

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 F9AR 04 (S339a) Bespoke Software 3

Unit summary

Select and use a range of advanced bespoke or specialist software tools and techniques for complex or non-routine information. 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 information using specialist or bespoke software

1 Input relevant information accurately so that it is ready for processing.
2 Select and use appropriate techniques to link and combine information within the application and across different software applications.

Create and modify appropriate structures to organise and retrieve information efficiently

3 Select, change and use appropriate structures and layouts to organise information efficiently.
4 Handle data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available.

Exploit the functions of the software effectively to process and present information

5 Select and use appropriate tools and techniques to edit, analyse and format information.
6 Check information meets needs, using IT tools and making corrections as necessary.
7 Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs.
8 Select and use presentation methods to aid clarity and meaning.

Knowledge

You will know:

Create and modify appropriate structures to organise and retrieve information efficiently

1 Evaluate the use of software functions to structure, layout and style information.

UNIT F9AR 04 (S339a) Bespoke Software 3

Record of evidence

Performance indicators	Evidence numbers	Evidence type
Input and combine information using specialist or bespoke software		
1 Input relevant information accurately so that it is ready for processing.		
2 Select and use appropriate techniques to link and combine information within the application and across different software applications.		
Create and modify appropriate structures to organise and retrieve information efficiently		
3 Select, change and use appropriate structures and layouts to organise information efficiently.		
4 Handle data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available.		
Exploit the functions of the software effectively to process and present information		
5 Select and use appropriate tools and techniques to edit, analyse and format information.		
6 Check information meets needs, using IT tools and making corrections as necessary.		
7 Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs.		
8 Select and use presentation methods to aid clarity and meaning.		

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

Knowledge requirements	Evidence numbers	Evidence type
Create and modify appropriate structures to organise and retrieve information efficiently		
1 Evaluate the use of software functions to structure, layout and style 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 F9AW 04 (S339b) Specialist Software 3

Unit summary

Select and use a range of advanced bespoke or specialist software tools and techniques for complex or non-routine information. 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 information using specialist or bespoke software
1   Input relevant information accurately so that it is ready for processing.
2   Select and use appropriate techniques to link and combine information within the application and across different software applications.

Create and modify appropriate structures to organise and retrieve information efficiently
3   Select, change and use appropriate structures and layouts to organise information efficiently.
4   Handle data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available.

Exploit the functions of the software effectively to process and present information
5   Select and use appropriate tools and techniques to edit, analyse and format information.
6   Check information meets needs, using IT tools and making corrections as necessary.
7   Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs.
8   Select and use presentation methods to aid clarity and meaning.

Knowledge

You will know:

Create and modify appropriate structures to organise and retrieve information efficiently
1   Evaluate the use of software functions to structure, layout and style information.

UNIT F9AW 04 (S339b) Specialist Software 3

Record of evidence

Performance indicators	Evidence numbers	Evidence type
Input and combine information using specialist or bespoke software		
1 Input relevant information accurately so that it is ready for processing.		
2 Select and use appropriate techniques to link and combine information within the application and across different software applications.		
Create and modify appropriate structures to organise and retrieve information efficiently		
3 Select, change and use appropriate structures and layouts to organise information efficiently.		
4 Handle data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available.		
Exploit the functions of the software effectively to process and present information		
5 Select and use appropriate tools and techniques to edit, analyse and format information.		
6 Check information meets needs, using IT tools and making corrections as necessary.		
7 Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs.		
8 Select and use presentation methods to aid clarity and meaning.		

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

Knowledge requirements	Evidence numbers	Evidence type
Create and modify appropriate structures to organise and retrieve information efficiently		
1 Evaluate the use of software functions to structure, layout and style 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 F9C3 04 (S340)   Data Management Software 3

Unit summary

Select and use a range of advanced bespoke or specialist software tools and techniques for complex or non-routine information. 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:

Enter, edit and maintain data records in a data management system
1 Enter data accurately into records to meet requirements.
2 Configure characteristics of groups of records.
3 Check data records meet needs, using IT tools and making corrections as necessary.
4 Interpret and respond appropriately to a range of data and application error messages.
5 Manage data files effectively, in line with local and/or legal guidelines for the storage and use of data where available.

Retrieve and display data records to meet requirements
6 Create and use queries to search for and retrieve information from the system.
7 Create, define and set up reports to output information to meet requirements.
8 Use the file handling techniques of the software to import and export data.
9 Use available techniques to combine and link data.

Knowledge

You will know:

Enter, edit and maintain data records in a data management system
1 Discuss when and how to change or create a new data entry form.
2 Discuss and explain how to locate and amend data records.
3 Evaluate and explain the risks to data security and procedures used for data protection.

Retrieve and display data records to meet requirements
4 Determine and explain what queries and reports need to be run to output the required information.

UNIT F9C3 04 (S340) Data Management Software 3

Record of evidence

Performance indicators	Evidence numbers	Evidence type
Enter, edit and maintain data records in a data management system		
1 Enter data accurately into records to meet requirements.		
2 Configure characteristics of groups of records.		
3 Check data records meet needs, using IT tools and making corrections as necessary.		
4 Interpret and respond appropriately to a range of data and application error messages.		
5 Manage data files effectively, in line with local and/or legal guidelines for the storage and use of data where available.		
Retrieve and display data records to meet requirements		
6 Create and use queries to search for and retrieve information from the system.		
7 Create, define and set up reports to output information to meet requirements.		
8 Use the file handling techniques of the software to import and export data.		
9 Use available techniques to combine and link data.		

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

UNIT F9C3 04 (S340)   Data Management Software 3

Knowledge requirements	Evidence numbers	Evidence type
Enter, edit and maintain data records in a data management system		
1 Discuss when and how to change or create a new data entry form.		
2 Discuss and explain how to locate and amend data records.		
3 Evaluate and explain the risks to data security and procedures used for data protection.		
Retrieve and display data records to meet requirements		
4 Determine and explain 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 F9C6 04 (S341)   Database Software 3

Unit summary

Select and use advanced database software tools and techniques efficiently to:

♦   enter complex information into databases;
♦   retrieve information by creating queries using multiple selection criteria;
♦   produce reports by setting up menus or short cuts.

Also, be able to design, create and interrogate multiple-table relational databases. This standard is imported from the **e- Users suite.skills IT**

Skills

You will apply the following skills:

♦   Analysing.
♦   Checking.
♦   Organising.
♦   Planning.
♦   Presenting information.
♦   Using technology.

Performance indicators

You will:

Plan, create and modify relational database tables to meet requirements
1   Plan and create multiple tables for data entry with appropriate fields and properties.
2   Set up and modify relationships between database tables.
3   Respond appropriately to problems with database tables.
4   Use database tools and techniques to ensure data integrity is maintained.

Enter, edit and organise structured information in a database
5   Design and create forms to access, enter, edit and organise data in a database.
6   Select and use appropriate tools and techniques to format data entry forms.
7   Check data entry meets needs, using IT tools and making corrections as necessary.
8   Respond appropriately to data entry errors.

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

UNIT F9C6 04 (S341)   Database Software 3

Knowledge

You will know:

Plan, create and modify relational database tables to meet requirements
1   Explain how a relational database design enables data to be organised and queried.
2   Explain why and how to maintain data integrity.

Use database software tools to extract information, produce reports
3   Explain how to select, generate and output information from queries according to requirements.

UNIT F9C6 04 (S341)   Database Software 3

Record of evidence

Performance indicators	Evidence numbers	Evidence type
Plan, create and modify relational database tables to meet requirements		
1 Plan and create multiple tables for data entry with appropriate fields and properties.		
2 Set up and modify relationships between database tables.		
3 Respond appropriately to problems with database tables.		
4 Use database tools and techniques to ensure data integrity is maintained.		
Enter, edit and organise structured information in a database		
5 Design and create forms to access, enter, edit and organise data in a database.		
6 Select and use appropriate tools and techniques to format data entry forms.		
7 Check data entry meets needs, using IT tools and making corrections as necessary.		
8 Respond appropriately to data entry errors.		
Use database software tools to extract information, produce reports		
9 Create and run database queries to display, amend or calculate selected data.		
10 Plan and produce database reports from a multiple-table relational database.		
11 Select and use appropriate tools and techniques to format database reports.		
12 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.

UNIT F9C6 04 (S341)   Database Software 3

Knowledge requirements	Evidence numbers	Evidence type
Plan, create and modify relational database tables to meet requirements		
1 Explain how a relational database design enables data to be organised and queried.		
2 Explain why and how to maintain data integrity.		
Use database software tools to extract information, produce reports		
3 Explain how to select, generate and output information from queries according to requirements.		

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 F99F 04 (S342)   Improving Productivity using IT 3

Unit summary

Plan and review their use of predefined or commonly used IT tools for activities most of which are complex and non-routine. As a result of reviewing their work, an individual will be able to devise solutions in the use of IT tools in order to improve productivity. They will take considerable responsibility and autonomy, and be prepared to offer support and advice to others. 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   Develop plans for using IT for different tasks and purposes, including contingencies.
2   Select and use appropriate IT systems and software applications to produce effective outcomes.

Evaluate the selection and use of IT tools to make sure that activities are successful
3   Review ongoing use of IT tools and techniques and change the approach as needed.
4   Evaluate and test solutions to make sure they match requirements and are fit for purpose.
5   Be prepared to give feedback on other people's selection and use of IT tools.

Devise solutions to improve the use of IT tools and systems for self and others
6   Develop solutions that make a demonstrable improvement to the use of IT tools and systems.
7   Test solutions to make sure that they work as intended.
8   Recommend improvements to IT systems and procedures that increase productivity.

UNIT F99F 04 (S342)   Improving Productivity using IT 3

Knowledge

You will know:

Plan, select and use appropriate IT systems and software for different purposes
1   Explain the purpose for using IT.
2   Analyse the methods, skills and resources required to complete the task successfully.
3   Analyse any factors that may affect the task.
4   Critically compare alternative methods to produce the intended outcome.
5   Explain why different software applications could be chosen to suit different tasks, purposes and outcomes.
6   Explain any legal or local guidelines or constraints which apply to the task or activity.

Evaluate the selection and use of IT tools to make sure that activities are successful
7   Critically compare the strengths and weaknesses of own and other people's final work.
8   Explain different ways to make further improvements to work.

Devise solutions to improve the use of IT tools and systems for self and others
9   Evaluate the productivity and efficiency of IT systems and procedures used by self and others.
10 Research and advise on ways to improve productivity and efficiency.

UNIT F99F 04 (S342)   Improving Productivity using IT 3

Record of evidence

Performance indicators	Evidence numbers	Evidence type
Plan, select and use appropriate IT systems and software for different purposes		
1 Develop plans for using IT for different tasks and purposes, including contingencies.		
2 Select and use appropriate IT systems and software applications to produce effective outcomes.		
Evaluate the selection and use of IT tools to make sure that activities are successful		
3 Review ongoing use of IT tools and techniques and change the approach as needed.		
4 Evaluate and test solutions to make sure they match requirements and are fit for purpose.		
5 Be prepared to give feedback on other people's selection and use of IT tools.		
Devise solutions to improve the use of IT tools and systems for self and others		
6 Develop solutions that make a demonstrable improvement to the use of IT tools and systems.		
7 Test solutions to make sure that they work as intended.		
8 Recommend improvements to IT systems and procedures that increase productivity.		

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

UNIT F99F 04 (S342)   Improving Productivity using IT 3

Knowledge requirements	Evidence numbers	Evidence type
Plan, select and use appropriate IT systems and software for different purposes		
1 Explain the purpose for using IT.		
2 Analyse the methods, skills and resources required to complete the task successfully.		
3 Analyse any factors that may affect the task.		
4 Critically compare alternative methods to produce the intended outcome.		
5 Explain why different software applications could be chosen to suit different tasks, purposes and outcomes.		
6 Explain any legal or local guidelines or constraints which apply to the task or activity.		
Evaluate the selection and use of IT tools to make sure that activities are successful		
7 Critically compare the strengths and weaknesses of own and other people's final work.		
8 Explain different ways to make further improvements to work.		
Devise solutions to improve the use of IT tools and systems for self and others		
9 Evaluate the productivity and efficiency of IT systems and procedures used by self and others.		
10 Research and advise on 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:** _____

Assessor: _____   **Date:** _____

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

UNIT F99V 04 (S343)   IT Security for Users 3

Unit summary

Monitor potential risks and take steps to protect their own and others' systems, data and software (eg from unauthorised remote access, disaster recovery or contingency planning). 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, use and develop appropriate procedures to monitor and minimise security risk to IT systems and data
1 Select, use and evaluate a range of security precautions to protect IT systems and monitor security.
2 Manage access to information sources securely to maintain confidentiality, integrity and availability of information.
3 Apply, maintain and develop guidelines and procedures for the secure use of IT.
4 Select and use effective backup and archiving procedures for systems and data.

Knowledge

You will know:

Select, use and develop appropriate procedures to monitor and minimise security risk to IT systems and data
1 Evaluate the security issues that may threaten system performance.
2 Evaluate the threats to system and information security and integrity.
3 Explain why and how to minimise security risks to hardware, software and data for different users.

UNIT F99V 04 (S343)   IT Security for Users 3

Record of evidence

Performance indicators	Evidence numbers	Evidence type
Select, use and develop appropriate procedures to monitor and minimise security risk to IT systems and data		
1 Select, use and evaluate a range of security precautions to protect IT systems and monitor security.		
2 Manage access to information sources securely to maintain confidentiality, integrity and availability of information.		
3 Apply, maintain and develop guidelines and procedures for the secure use of IT.		
4 Select and use effective backup and archiving 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
Select, use and develop appropriate procedures to monitor and minimise security risk to IT systems and data		
1 Evaluate the security issues that may threaten system performance.		
2 Evaluate the threats to system and information security and integrity.		
3 Explain why and how to minimise security risks to hardware, software and data for different users.		

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 F9CV 04 (S344)   Presentation Software 3

Unit summary

Select and use a wide range of advanced presentation software tools and techniques effectively to produce presentations that are complex or non-routine. This standard is imported from the **e-skills IT Users suite.**

Skills

You will apply the following skills:

♦ Communicating.
♦ Evaluating.
♦ Managing time.
♦ Organising.
♦ 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 and link to source data.
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, format and display presentations
6 Create, amend and use appropriate templates and themes for slides.
7 Select and use appropriate techniques to edit and format presentations to meet needs.
8 Create and use interactive elements to enhance presentations.
9 Select and use animation and transition techniques appropriately to enhance presentation.

Prepare interactive slideshow for presentation
10 Prepare interactive slideshow and associated products for presentation.
11 Check presentation meets needs, using IT tools and making corrections as necessary.
12 Respond appropriately to quality problems to ensure that presentations meet needs and are fit for purpose.

UNIT F9CV 04 (S344)   Presentation Software 3

Knowledge

You will know:

Input and combine text and other information within presentation slides
1   Explain what types of information are needed for the presentation.
2   Identify any constraints which may affect the presentation.

Use presentation software tools to structure, edit, format and display presentations
3   Explain when and how to use and change slide templates and themes to aid meaning or impact.
4   Explain how interactive and presentation effects can be used to enhance the presentation.

Prepare interactive slideshow for presentation
5   Explain how to present slides to communicate effectively for different contexts.
6   Evaluate presentations, identify any quality problems and discuss how to respond to them.

UNIT F9CV 04 (S344)   Presentation Software 3

Record of evidence

Performance indicators	Evidence numbers	Evidence type
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 and link to source data.		
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, format and display presentations		
6 Create, amend and use appropriate templates and themes for slides.		
7 Select and use appropriate techniques to edit and format presentations to meet needs.		
8 Create and use interactive elements to enhance presentations.		
9 Select and use animation and transition techniques appropriately to enhance presentation.		
Prepare interactive slideshow for presentation		
10 Prepare interactive slideshow and associated products for presentation.		
11 Check presentation meets needs, using IT tools and making corrections as necessary.		
12 Respond appropriately to quality problems to ensure that presentations meet needs and are fit for purpose.		

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

UNIT F9CV 04 (S344)   Presentation Software 3

Knowledge requirements	Evidence numbers	Evidence type
Input and combine text and other information within presentation slides		
1 Explain what types of information are needed for the presentation.		
2 Identify any constraints which may affect the presentation.		
Use presentation software tools to structure, edit, format and display presentations		
3 Explain when and how to use and change slide templates and themes to aid meaning or impact.		
4 Explain how interactive and presentation effects can be used to enhance the presentation.		
Prepare interactive slideshow for presentation		
5 Explain how to present slides to communicate effectively for different contexts.		
6 Evaluate presentations, identify any quality problems and discuss how to respond to them.		

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 F99L 04 (S345)   Setting up an IT System 3

Unit summary

Select and connect up an IT system with a range of hardware, removable storage media and a communication service safely and successfully and is able to help others to do so. 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 IT system to a communication service successfully 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 operating system and application software ready for use
4   Configure the user interface to meet needs.
5   Install, set up and configure virus protection and other security systems and software.
6   Establish a backup routine for data and system.
7   Install, set up and configure application software to meet needs.

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   Establish procedures for recovery in the event of system faults or failure.
10   Respond to faults and error messages and use help and troubleshooting facilities to determine and take appropriate action.

UNIT F99L 04 (S345)   Setting up an IT System 3

Knowledge

You will know:

Select and connect up a personal computer safely with associated hardware and storage media to meet needs
1   Explain the reasons for choosing different system components and how to avoid any compatibility issues between hardware and software.
2   Explain any health and safety issues associated with setting up an IT system.
3   Explain the characteristics of IT systems that affect performance.

Select and connect IT system to a communication service successfully to meet needs
4   Explain the reasons for choosing a communication service.
5   Explain what effect variations in data transmission speed may have.
6   Explain the factors which influence choice of Internet Service Providers.

Install and configure operating system and application software ready for use
7   Explain what security precautions need to be addressed for the system to be used securely online by several users.
8   Explain the benefits and risks of using disk partitions or other backup locations.

Check that the IT system and communication service are working successfully
9   Explain what system tests and communication tests are needed and why.
10 Explain the range of help and troubleshooting facilities available to solve problems.

UNIT F99L 04 (S345)   Setting up an IT System 3

Record of evidence

Performance indicators	Evidence numbers	Evidence type
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 IT system to a communication service successfully 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 operating system and application software ready for use		
4 Configure the user interface to meet needs.		
5 Install, set up and configure virus protection and other security systems and software.		
6 Establish a backup routine for data and system.		
7 Install, set up and configure application software to meet needs.		
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 Establish procedures for recovery in the event of system faults or failure.		
10 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 F99L 04 (S345)   Setting up an IT System 3

Knowledge requirements	Evidence numbers	Evidence type
Select and connect up a personal computer safely with associated hardware and storage media to meet needs		
1 Explain the reasons for choosing different system components and how to avoid any compatibility issues between hardware and software.		
2 Explain any health and safety issues associated with setting up an IT system.		
3 Explain the characteristics of IT systems that affect performance.		
Select and connect IT system to a communication service successfully to meet needs		
4 Explain the reasons for choosing a communication service.		
5 Explain what effect variations in data transmission speed may have.		
6 Explain the factors which influence choice of Internet Service Providers.		
Install and configure operating system and application software ready for use		
7 Explain what security precautions need to be addressed for the system to be used securely online by several users.		
8 Explain the benefits and risks of using disk partitions or other backup locations.		
Check that the IT system and communication service are working successfully		
9 Explain what system tests and communication tests are needed and why.		
10 Explain the range of 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: _____   **Date:** _____
(if sampled)

UNIT F9D2 04 (S346)   Spreadsheet Software 3

Unit summary

Select and use a wide range of advanced spreadsheet software tools and techniques to produce, present and check complex and non-routine spreadsheets. 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 spreadsheet data accurately.
2   Combine and link data from different sources.
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 and techniques to meet requirements
4   Select and use a wide range of appropriate functions and formulas to meet calculation requirements.
5   Select and use a range of tools and techniques to analyse and interpret the required information.
6   Select and use forecasting tools and techniques.

Use tools and techniques to present, and format and publish spreadsheet information
7   Select and use appropriate tools and techniques to format spreadsheet cells, rows. columns and worksheets effectively.
8   Select and use appropriate tools and techniques to generate, develop and format charts and graphs.
9   Select and use appropriate page layout to present, print and publish spreadsheet information.
10 Check spreadsheet information meets needs, using IT tools and making corrections as necessary.
11 Use auditing tools to identify and respond appropriately to any problems with spreadsheets.

UNIT F9D2 04 (S346)   Spreadsheet Software 3

Knowledge

You will know:

Use a spreadsheet to enter, edit and organise numerical and other information
1   Identify what numerical and other information is needed in the spreadsheet and how it should be structured.

Select and use appropriate formulas and data analysis tools and techniques to meet requirements
2   Describe what methods can be used to summarise, analyse and interpret spreadsheet data and when to use them.

Use tools and techniques to present, and format and publish spreadsheet information
3   Explain how to present and format spreadsheet information effectively to meet needs.
4   Explain which chart or graph type to use to display for different types of information
5   Explain how to find and sort out any errors in formulas.

UNIT F9D2 04 (S346)   Spreadsheet Software 3

Record of evidence

Performance indicators	Evidence numbers	Evidence type
Use a spreadsheet to enter, edit and organise numerical and other information		
1 Enter and edit spreadsheet data accurately.		
2 Combine and link data from different sources.		
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 and techniques to meet requirements		
4 Select and use a wide range of appropriate functions and formulas to meet calculation requirements.		
5 Select and use a range of tools and techniques to analyse and interpret the required information.		
6 Select and use forecasting tools and techniques.		
Use tools and techniques to present, and format and publish spreadsheet information		
7 Select and use appropriate tools and techniques to format spreadsheet cells, rows. columns and worksheets effectively.		
8 Select and use appropriate tools and techniques to generate, develop and format charts and graphs.		
9 Select and use appropriate page layout to present, print and publish spreadsheet information.		
10 Check spreadsheet information meets needs, using IT tools and making corrections as necessary.		
11 Use auditing tools to identify and respond appropriately to any problems with spreadsheets.		

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

UNIT F9D2 04 (S346)   Spreadsheet Software 3

Knowledge requirements	Evidence numbers	Evidence type
Use a spreadsheet to enter, edit and organise numerical and other information		
1 Identify what numerical and other information is needed in the spreadsheet and how it should be structured.		
Select and use appropriate formulas and data analysis tools and techniques to meet requirements		
2 Describe what methods can be used to summarise, analyse and interpret spreadsheet data and when to use them.		
Use tools and techniques to present, and format and publish spreadsheet information		
3 Explain how to present and format spreadsheet information effectively to meet needs.		
4 Explain which chart or graph type to use to display for different types of information.		
5 Explain how to find and sort out any errors in formulas		

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 F9A8 04 (S347)   Using Collaborative Technologies 3

Unit summary

Manage and effectively integrate and facilitate the safe use of multiple IT tools and devices so that groups can work collaboratively and effectively by:
♦   setting and implementing guidelines for using collaborative technologies;
♦   integrating IT tools and devices and creating environments to exploit their potential;
♦   managing risks, permissions and data flow; and
♦   moderating and solving complex problems with the use of collaborative technologies.
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 with collaborative technology
1   Develop and implement guidelines for good practice in working with collaborative technology.
2   Develop and implement guidelines for checking the authenticity of identities and different types of information.
3   Analyse and manage risks in the use of collaborative technologies.

Plan and set up IT tools and devices for collaborative working
4   Select and integrate combinations that exploit the capabilities and potential of collaborative tools and devices.
5   Resolve access and compatibility problems so that different collaborative tools and devices work successfully.

Prepare collaborative technologies for use
6   Manage levels of access and permissions for different purposes.
7   Select and integrate different elements across applications to create environments for collaborative technologies.
8   Set and adjust settings to facilitate other's use of collaborative technologies.
9   Manage data flow to benefit collaborative working.

Manage tasks using collaborative technologies
10 Facilitate other's responsible contributions to and engagement with collaborative technologies.
11 Manage the moderation of collaborative technologies.
12 Oversee the archiving of the outcomes of collaborative working.
13 Respond to problems with collaborative technologies and be prepared to help others to do so.

UNIT F9A8 04 (S347)   Using Collaborative Technologies 3

Knowledge

You will know:

Stay safe and secure when with collaborative technology
1   Explain what and why guidelines need to be established for working with collaborative technology.
2   Explain how to establish an identity or present information that will promote trust.
3   Analyse and plan for the risks in the use of collaborative technologies for different tasks.

Plan and set up IT tools and devices for collaborative working
4   Explain the features, benefits and limitations of different collaborative IT tools and devices for work purposes and tasks.
5   Determine the IT tools and processes needed for archiving the outcomes of collaborative working.
6   Summarise ways to integrate different collaborative technology tools and devices for a range of purposes, tasks and communication media.
7   Explain potential access and compatibility issues with integrating different collaborative technology tools and devices.

Prepare collaborative technologies for use
8   Evaluate data management principles, issues and methods.

Manage tasks using collaborative technologies
9   Determine levels of responsibility for the use of collaborative technologies.
10 Explain what problems can occur with collaborative technologies.

UNIT F9A8 04 (S347)   Using Collaborative Technologies 3

Record of evidence

Performance indicators	Evidence numbers	Evidence type
Stay safe and secure when with collaborative technology		
1 Develop and implement guidelines for good practice in working with collaborative technology.		
2 Develop and implement guidelines for checking the authenticity of identities and different types of information.		
3 Analyse and manage risks in the use of collaborative technologies.		
Plan and set up IT tools and devices for collaborative working		
4 Select and integrate combinations that exploit the capabilities and potential of collaborative tools and devices.		
5 Resolve access and compatibility problems so that different collaborative tools and devices work successfully.		
Prepare collaborative technologies for use		
6 Manage levels of access and permissions for different purposes.		
7 Select and integrate different elements across applications to create environments for collaborative technologies.		
8 Set and adjust settings to facilitate other's use of collaborative technologies.		
9 Manage data flow to benefit collaborative working.		
Manage tasks using collaborative technologies		
10 Facilitate other's responsible contributions to and engagement with collaborative technologies.		
11 Manage the moderation of collaborative technologies.		
12 Oversee the archiving of the outcomes of collaborative working.		
13 Respond to problems with collaborative technologies and be prepared to help others to do so.		

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

UNIT F9A8 04 (S347)   Using Collaborative Technologies 3

Knowledge requirements	Evidence numbers	Evidence type
Stay safe and secure when with collaborative technology		
1 Explain what and why guidelines need to be established for working with collaborative technology.		
2 Explain how to establish an identity or present information that will promote trust.		
3 Analyse and plan for the risks in the use of collaborative technologies for different tasks.		
Plan and set up IT tools and devices for collaborative working		
4 Explain the features, benefits and limitations of different collaborative IT tools and devices for work purposes and tasks.		
5 Determine the IT tools and processes needed for archiving the outcomes of collaborative working.		
6 Summarise ways to integrate different collaborative technology tools and devices for a range of purposes, tasks and communication media.		
7 Explain potential access and compatibility issues with integrating different collaborative technology tools and devices		
Prepare collaborative technologies for use		
8 Evaluate data management principles, issues and methods.		
Manage tasks using collaborative technologies		
9 Determine levels of responsibility for the use of collaborative technologies.		
10 Explain what problems can occur with collaborative technologies.		

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 F9D5 04 (S348)   Website Software 3

Unit summary

Select and use a range of advanced website software tools and techniques to develop multiple-page websites with multimedia and interactive features. 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 and use them to produce websites
1   Plan and create web page templates to layout content.
2   Create, select and use styles to keep the appearance of web pages consistent.
3   Store and retrieve document files effectively, in line with local guidelines and conventions where available.

Select and use advanced tools and features of website software to develop multiple page websites with multimedia and interactive features
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 meaning.
7   Select and use appropriate programming and development techniques to add features and enhance websites.
8   Select and use file formats that make information easier to download.
9   Check web pages meet needs, using IT tools and making corrections as necessary.

Publish multiple page websites with multimedia and interactive features
10 Upload content to web page template
11 Select and use appropriate testing methods to check that all elements and features of complex websites are working as planned.
12 Respond appropriately to quality problems with websites to ensure outcomes are fit for purpose.
13 Select and use an appropriate programme to upload and publish the website and make sure that it will download efficiently.

UNIT F9D5 04 (S348)   Website Software 3

Knowledge

You will know:

Create structures and styles and use them to produce websites
1   Determine and discuss what website content and layout will be needed for each page and for the site.
2   Provide guidance on constraints that affect the content and use of websites.
3   Determine and discuss the requirements for structure and style.
4   Determine and discuss what website features are needed.
5   Explain what access issues may need to be taken into account.
6   Explain when and why to use different file types for saving content.

Publish multiple page websites with multimedia and interactive features
7   Identify any quality problems with websites and discuss how to respond to them.

UNIT F9D5 04 (S348)   Website Software 3

Record of evidence

Performance indicators	Evidence numbers	Evidence type
Create structures and styles and use them to produce websites		
1 Plan and create web page templates to layout content.		
2 Create, select and use styles to keep the appearance of web pages consistent.		
3 Store and retrieve document files effectively, in line with local guidelines and conventions where available.		
Select and use advanced tools and features of website software to develop multiple page websites with multimedia and interactive features		
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 meaning.		
7 Select and use appropriate programming and development techniques to add features and enhance websites.		
8 Select and use file formats that make information easier to download.		
9 Check web pages meet needs, using IT tools and making corrections as necessary.		
Publish multiple page websites with multimedia and interactive features		
10 Upload content to web page template.		
11 Select and use appropriate testing methods to check that all elements and features of complex websites are working as planned.		
12 Respond appropriately to quality problems with websites to ensure outcomes are fit for purpose.		
13 Select and use an appropriate programme to upload and publish the website and make sure that it will download efficiently		

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

UNIT F9D5 04 (S348)   Website Software 3

Knowledge requirements	Evidence numbers	Evidence type
Create structures and styles and use them to produce websites		
1 Determine and discuss what website content and layout will be needed for each page and for the site.		
2 Provide guidance on constraints that affect the content and use of websites.		
3 Determine and discuss the requirements for structure and style.		
4 Determine and discuss what website features are needed.		
5 Explain what access issues may need to be taken into account.		
6 Explain when and why to use different file types for saving content.		
Publish multiple page websites with multimedia and interactive features		
7 Identify any quality problems with websites and discuss how to respond to them.		

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 F9D8 04 (S349)   Word Processing Software 3

Unit summary

Select and use a range of advanced word processing software tools and techniques to produce complex and non-routine documents. 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   Create, change and use appropriate templates for different types of documents.
3   Combine and merge information within a document from a range of sources.
4   Store and retrieve document and associated files effectively, in line with local guidelines and conventions where available.
5   Select and use tools and techniques to work with multiple documents or users.
6   Customise interface to meet needs.

Create and modify appropriate layouts, structures and styles for word processing documents
7   Create and modify columns, tables and forms to organise information.
8   Define and modify styles for document elements.
9   Select and use appropriate page and section layouts to present and print multi-page and multi-section documents.
10   Select and use tools and techniques to organise and structure long documents

Use word processing software tools and techniques to format and present documents effectively and improve efficiency
11   Select and use appropriate techniques to edit and format characters and paragraphs.
12   Check documents meet needs, using IT tools and making corrections as necessary.
13   Respond appropriately to any quality problems with documents to ensure that outcomes meet needs and are fit for purpose.

UNIT F9D8 04 (S349)   Word Processing Software 3

Knowledge

You will know:

Input and combine text and other information accurately within word processing documents
1   Summarise what forms of information are needed for the document and how they should be linked or integrated.
2   Explain how to combine and merge information from other software or multiple documents.

Create and modify appropriate layouts, structures and styles for word processing documents
3   Analyse and explain the requirements for structure and style.

Use word processing software tools and techniques to format and present documents effectively and improve efficiency
4   Determine and discuss how the information should be formatted to aid meaning.
5   Evaluate the quality of the documents produced to ensure they are fit for purpose.

UNIT F9D8 04 (S349)   Word Processing Software 3

Record of evidence

Performance indicators	Evidence numbers	Evidence type
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 Create, change and use appropriate templates for different types of documents.		
3 Combine and merge information within a document from a range of sources.		
4 Store and retrieve document and associated files effectively, in line with local guidelines and conventions where available.		
5 Select and use tools and techniques to work with multiple documents or users.		
6 Customise interface to meet needs.		
Create and modify appropriate layouts, structures and styles for word processing documents		
7 Create and modify columns, tables and forms to organise information.		
8 Define and modify styles for document elements.		
9 Select and use appropriate page and section layouts to present and print multi-page and multi-section documents.		
10 Select and use tools and techniques to organise and structure long documents		
Use word processing software tools and techniques to format and present documents effectively and improve efficiency		
11 Select and use appropriate techniques to edit and format characters and paragraphs.		
12 Check documents meet needs, using IT tools and making corrections as necessary.		
13 Respond appropriately to any quality problems with documents to ensure that outcomes meet needs and are fit for purpose.		

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

UNIT F9D8 04 (S349)   Word Processing Software 3

Knowledge requirements	Evidence numbers	Evidence type
Input and combine text and other information accurately within word processing documents		
1 Summarise what forms of information are needed for the document and how they should be linked or integrated.		
2 Explain how to combine and merge information from other software or multiple documents.		
Create and modify appropriate layouts, structures and styles for word processing documents		
3 Analyse and explain the requirements for structure and style.		
Use word processing software tools and techniques to format and present documents effectively and improve efficiency		
4 Determine and discuss how the information should be formatted to aid meaning.		
5 Evaluate the quality of the documents produced to ensure they are fit for purpose.		

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 F9A5 04 (S350)   Using Email 3

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:

Use 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 manage contact information.

Manage use of e-mail software effectively
4   Develop guidelines and procedures for using e-mail effectively.
5   Read and respond appropriately to e-mail messages and attachments.
6   Use email software tools and techniques to automate responses.
7   Organise, store and archive e-mail messages effectively.
8   Customise e-mail software to make it easier to use.
9   Respond appropriately to e-mail problems.

Knowledge

You will know:

Use e-mail software tools and techniques to send and receive messages
1   Explain methods to improve message transmission.
2   Explain why and how to stay safe and respect others when using e-mail.

Manage use of e-mail software effectively
3   Explain why, what and when to archive messages.
4   Explain how to minimise e-mail problems.

UNIT F9A5 04 (S350)   Using Email 3

Record of evidence

Performance indicators	Evidence numbers	Evidence type
Use 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 manage contact information.		
Manage use of e-mail software effectively		
4 Develop guidelines and procedures for using e-mail effectively.		
5 Read and respond appropriately to e-mail messages and attachments.		
6 Use email software tools and techniques to automate responses.		
7 Organise, store and archive e-mail messages effectively.		
8 Customise e-mail software to make it easier to use.		
9 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
Use e-mail software tools and techniques to send and receive messages		
1 Explain methods to improve message transmission.		
2 Explain why and how to stay safe and respect others when using e-mail.		
Manage use of e-mail software effectively		
3 Explain why, what and when to archive messages.		
4 Explain how to minimise e-mail 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 J6X3 04 (S360)   Develop Skills and Competencies about Social Media Channels and Digital Platforms

Unit summary

This standard is part of competence area related to digital technologies, channels and platforms. It covers developing skills and competences about social channels and digital platforms. As a digital marketeer, you promote products, services and brands with your target audience using social media channels and platforms. The important skills include strong communication skills, creativity, knowledge of social media management and scheduling tools, analytical and reporting skills, understanding of social media advertising and post-boosting techniques, research and planning abilities. All these skills enable you to expand the reach of your content, stay up to date with social media trends and best practices, maintain your business presence on social media and increase the revenue. This standard is for Digital Marketing professionals who are involved in developing skills and competencies about social media channels and digital platforms.

Skills

You will apply the following skills:

- ◆ Analytical.
- ◆ Methodical.
- ◆ Organised.
- ◆ Communication.
- ◆ Storytelling.
- ◆ Collaborating.
- ◆ Problem solving.
- ◆ Sense making.
- ◆ Digital technology.
- ◆ Creativity.
- ◆ Innovative.
- ◆ Keeping to deadlines.

UNIT J6X3 04 (S360)   Develop Skills and Competencies about Social Media Channels and Digital Platforms

Performance criteria

You must be able to:

1   Develop social media campaigns aimed at your target audiences.
2   Identify the objectives for the marketing activities.
3   Create and launch the social media campaigns.
4   Collect information required for content creation for the target audiences.
5   Create visual and descriptive content about your products and services.
6   Tailor your content in the format relevant for each social media channel and digital platform.
7   Amplify your platform-specific content with relevant hashtags.
8   Refine, update and schedule content on a regular basis.
9   Optimise your online content with relevant keywords to increase the leads and interactions with your target audiences.
10   Use relevant social media management and scheduling tools for targeting your audiences and interaction with them.
11   Use the relevant software for content promotion.
12   Collate and interpret the data by using the analytical tools and software.
13   Evaluate the performance of social media marketing activities and make changes, where required.
14   Follow the legal, regulatory and ethical requirements relating to marketing activities.

Knowledge

You need to know and understand:

1   Your organisation's products and services.
2   Your target audiences.
3   The types of social media campaigns.
4   The range of social media channels and digital platforms.
5   How to create the relevant social media campaigns.
6   The key messages for each target audiences.
7   The hashtags for your content.
8   The search engine optimisation (SEO).
9   How to optimise your online content with relevant keywords.
10   The social media management and scheduling tools.
11   The analytical and reporting tools.
12   How to evaluate your social marketing performance against set metrics.
13   Why it is important to refine, update and schedule content on a regular basis.
14   The legal, regulatory and ethical requirements in relation to marketing activities.

UNIT J6X3 04 (S360)   Develop Skills and Competencies about Social Media Channels and Digital Platforms

Record of evidence

	Performance indicators	Evidence numbers	Evidence type
1	Develop social media campaigns aimed at your target audiences.		
2	Identify the objectives for the marketing activities.		
3	Create and launch the social media campaigns.		
4	Collect information required for content creation for the target audiences.		
5	Create visual and descriptive content about your products and services.		
6	Tailor your content in the format relevant for each social media channel and digital platform.		
7	Amplify your platform-specific content with relevant hashtags.		
8	Refine, update and schedule content on a regular basis.		
9	Optimise your online content with relevant keywords to increase the leads and interactions with your target audiences.		
10	Use relevant social media management and scheduling tools for targeting your audiences and interaction with them.		
11	Use the relevant software for content promotion.		
12	Collate and interpret the data by using the analytical tools and software.		
13	Evaluate the performance of social media marketing activities and make changes, where required.		
14	Follow the legal, regulatory and ethical requirements relating to marketing activities.		

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

UNIT J6X3 04 (S360)   Develop Skills and Competencies about Social Media Channels and Digital Platforms

Knowledge requirements	Evidence numbers	Evidence type
1 Your organisation's products and services.		
2 Your target audiences.		
3 The types of social media campaigns.		
4 The range of social media channels and digital platforms.		
5 How to create the relevant social media campaigns.		
6 The key messages for each target audiences.		
7 The hashtags for your content.		
8 The search engine optimisation (SEO).		
9 How to optimise your online content with relevant keywords.		
10 The social media management and scheduling tools.		
11 The analytical and reporting tools.		
12 How to evaluate your social marketing performance against set metrics.		
13 Why it is important to refine, update and schedule content on a regular basis.		
14 The legal, regulatory and ethical requirements in relation to marketing activities.		

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)

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

Your name	
Job title	
Name of employer / training provider / college	
Their address	
Telephone number	
SVQ	
Level	
Units submitted for assessment	
Mentor's name	
(Please provide details of mentor's experience)	

Assessor's signature _____ **Date** _____

Personal profile

Name	
Address	
Postcode	
Home telephone	
Work telephone	
Job title	

Relevant experience

Description of your current job	
Previous work experience	
Qualifications and training	
Voluntary work / interests	

Personal profile (cont)

Name of employer / training provider / college	
Address	
Postcode	
Telephone number	
Type of business	
Number of staff	
Structure of organisation (include chart or diagram if available)	

Personal statement

Evidence index number	Details of statement	Performance / knowledge and understanding statements covered

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.

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

Index of evidence

SVQ title and level	

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

Personal statement

Date	Evidence index number	Details of statement	Links to other evidence (enter numbers)	Units, elements, performance criteria, and range covered

Candidate's signature _____ **Date** _____

Observation record

Unit / element(s) _____

Candidate _____

Evidence index number _____

Date of observation _____

Skills / activities observed	Performance criteria covered

Knowledge and understanding apparent from this observation

Other units / elements to which this evidence may contribute

Assessor comments and feedback to candidate

I can confirm the candidate's performance was satisfactory.

Assessor's signature _____ **Date** _____

Candidate's signature _____ **Date** _____

Witness testimony

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

Details of testimony

I can confirm the candidate's performance was satisfactory.

Witness signature _____**Date** _____

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

☐ Holds 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

Unit	
Element(s)	
Evidence index number	

Circumstances of assessment

List of questions and candidate's responses

Q	
A	
Q	
A	
Q	
A	
Q	
A	
Q	
A	

Assessor's signature _____ **Date** _____

Candidate's signature _____ **Date** _____