

Unit DT0T 04 (1R1)

Process information for reception function

This Unit has the following elements:

Element 1 (1R1.1)	Deal with incoming and outgoing telephone calls
Element 2 (1R1.2)	Give people the information they need
Element 3 (1R1.3)	Do basic number work

Candidate Name:

Assessment Centre:

I have completed the requirements of this Unit.

Candidate signature: _____ **Date:** _____

I can confirm the candidate has completed all requirements of this Unit.

Assessor signature: _____ **Date:** _____

Assessor counter signature:
(where applicable) _____ **Date:** _____

IV signature: _____ **Date:** _____

IV counter signature:
(where applicable) _____ **Date:** _____

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Unit Summary

This Unit is about taking and receiving business telephone calls. It covers finding information for other people — for example customers and colleagues — and giving them this information quickly and clearly. The Unit also covers checking numbers and making basic calculations involving whole numbers and money (to two decimal places).

The typical day-to-day activities you might carry out for this Unit include:

- ◆ answering the telephone
- ◆ dealing with queries
- ◆ passing on messages
- ◆ finding information for other people
- ◆ organising this information and passing it on
- ◆ checking figures and calculations
- ◆ making basic calculations involving, for example, money

What some of the words in this Unit mean	
Confidentiality	not giving information to people who should not have it
Level of responsibility	what your organisation allows you to do and doesn't allow you to do

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Element 1 (1R1.1)

Deal with incoming and outgoing telephone calls

What you must do (circled numbers must be observed)		Assessor initials/date
Evidence for the remaining points may be assessed through questioning or witness testimony		
①	Answer the telephone promptly, using your organisation's style	
②	Identify the caller and what they need	
③	Answer queries accurately according to your own level of responsibility	
④	Make outgoing calls, for self or on behalf of others, using your organisation's style and procedures	
⑤	Give relevant information promptly and accurately	
6	Refer any queries that are beyond your level of responsibility to the appropriate member of staff	

What you must cover (minimum requirement for observation in italic and bold)	Activity/Evidence (insert tick or supplementary reference)					
	1	2	3	4	5	6
Evidence for the remaining points may be assessed through questioning or witness testimony						
<i>Telephone calls, both required from the following:</i>						
to and from people inside your organisation						
to and from people outside your organisation						

Unit DT0T 04 (1R1)**Process information for reception function****Element 1 (1R1.1)****Deal with incoming and outgoing telephone calls**

Candidate name:		Assessor initials/date
No	Activity	
1		
2		
3		
4		
5		
6		

Unit DT0T 04 (1R1)

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Element 2 (1R1.2)

Give people the information they need

What you must do (circled numbers must be observed)		Assessor initials/date
Evidence for the remaining points may be assessed through questioning or witness testimony		
①	Find out what information is needed	
②	Identify the right source for the information	
③	Get the information and organise it clearly and logically	
④	Give the information to the person who has asked for it within agreed time limits	
⑤	Avoid giving them confidential information	
6	Ask for help from an appropriate member of staff when you cannot find the information	
7	Politely explain to the person asking for the information if you have had problems finding it	

What you must cover (minimum requirement for observation in italic and bold)	Activity/Evidence (insert tick or supplementary reference)					
	1	2	3	4	5	6
Evidence for the remaining points may be assessed through questioning or witness testimony						
<i>Information sources, at least two required from the following:</i>						
from within the organisation						
from external sources						
own notes						
<i>Person requesting information, at least one required from the following:</i>						
inside your organisation						
outside your organisation						

Unit DT0T 04 (1R1)**Process information for reception function****Element 2 (1R1.2)****Give people the information they need**

Candidate name:		Assessor initials/date
No	Activity	
1		
2		
3		
4		
5		
6		

Unit DT0T 04 (1R1)

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Element 3 (1R1.3)

Do basic number work

What you must do (circled numbers must be observed)		Assessor initials/date
Evidence for the remaining points may be assessed through questioning or witness testimony		
①	Check numbers to make sure they are accurate and correct	
②	Carry out and check basic calculations	
③	Present the results of your checks and calculations neatly and clearly	
4	Promptly report any errors or things that do not match to the appropriate member of staff	

What you must cover (minimum requirement for observation in italic and bold)	Activity/Evidence (insert tick or supplementary reference)					
	1	2	3	4	5	6
Evidence for the remaining points may be assessed through questioning or witness testimony						
<i>Basic calculations, both required from the following:</i>						
addition, subtraction, multiplication and division of whole numbers						
addition, subtraction, multiplication and division of money to two decimal places						

Unit DT0T 04 (1R1)**Process information for reception function****Element 3 (1R1.3)****Do basic number work**

Candidate name:		Assessor initials/date
No	Activity	
1		
2		
3		
4		
5		
6		

What you must know for the Unit	
For the whole Unit	
K1	Your organisation's style for answering and making telephone calls and why it is important to use this
K2	How to establish a rapport and goodwill with people on the telephone
K3	The different types of telephone equipment in your workplace and how to use it
K4	Why it is important to communicate effectively and efficiently
K5	How to listen, interpret, extract and record information
Element 1 (1R1.1) Deal with incoming and outgoing telephone calls	
K6	How quickly you should answer the telephone
K7	Why it is important to establish a rapport and goodwill with callers
K8	How to compose messages accurately and effectively
Element 2 (1R1.2) Give people the information they need	
K9	Why it is important to interpret information and instructions correctly
K10	Sources of information you can use to help deal with queries
K11	Your organisation's policies and procedures for confidentiality and why you must follow these
K12	Basic legal requirements for data protection
Element 3 (1R1.3) Do basic number work	
K13	How to add, subtract, multiply and divide numbers
K14	How to check figures against other sources of information
K15	How to confirm figures are accurate
K16	What the procedures are for forwarding checked items
K17	What the reporting procedures are for inconsistencies

Knowledge evidence retained

Assessor signature: _____

Date: _____

Candidate name:		Assessor initials/date
Ref	Supplementary evidence	
A		
B		
C		
D		
E		
F		
G		
H		

Assessor Feedback