

Unit PPL1FOH9 (HL3G 04) Use a Filing System

I confirm that the evidence detailed in this unit is my own work.

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| **Candidate’s name** |  | **Candidate’s signature** |  | **Date** |
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I confirm that the candidate has achieved all the requirements of this unit.

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| **Assessor’s name** |  | **Assessor’s signature** |  | **Date** |
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| **Countersigning — Assessor’s name****(if applicable)** |  | **Countersigning — Assessor’s signature****(if applicable)** |  | **Date** |
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I confirm that the candidate’s sampled work meets the standards specified for this unit and may be presented for external verification.

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| **Internal verifier’s name** |  | **Internal verifier’s signature** |  | **Date** |
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| **Countersigning — Internal verifier’s name****(if applicable)** |  | **Countersigning — Internal verifier’s signature****(if applicable)** |  | **Date** |
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| **External Verifier’s initials and date (if sampled)** |  |

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| **Unit overview** |
| This unit is about different filing systems and how to use them effectively. It is for staff that may work on a reception desk or within a reservations department. The storing and retrieval of information is key to ensuring all staff can access it quickly and easily which leads to customers’ requests being met efficiently. |

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| **Sufficiency of evidence** |
| There must be sufficient evidence to ensure that the candidate can consistently achieve the required standard over a period of time in the workplace or approved realistic working environment. |

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| **Performance criteria** |
| **What you must do:** |
| There must be evidence for all Performance Criteria (PC). The assessor **must** assess PCs 1-3 and 5-7 by directly observing the candidate’s work. PCs 4, 8 and 9 may be assessed by alternative methods if observation is not possible. |
| **Process information****1 Collect required information.****2 Follow agreed procedures and legislation to maintain security and confidentiality.****3 Store required information in approved locations to the required standard.**4 Update information which is incomplete or out of date.**Retrieve information****5 Confirm information for retrieval.****6 Comply with procedures and legislation for accessing an information system.****7 Locate and retrieve required information.**8 Refer any problems with information systems to the appropriate colleague.9 Follow legal and organisational procedures and standards when deleting or destructing data. |

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| **Evidence reference** | **Evidence description** | **Date** | **Performance criteria** |
| **What you must do** |
|
| **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** |
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| **Knowledge and understanding** | **Evidence reference****and date** |
| **What you must know and understand** |
| For those knowledge statements that relate to **how** the candidate should do something, the assessor may be able to infer that the candidate has the necessary knowledge from observing their performance or checking products of their work. In **all** other cases, evidence of the candidate’s knowledge and understanding must be gathered by alternative methods of assessment (eg oral or written questioning). |
| 1 | The purpose of storing and retrieving required information |  |
| 2 | The different information systems and their main features |  |
| 3 | Legal and organisational requirements covering the security and confidentiality of information |  |
| 4 | The purpose of confirming the information to be collected, stored and retrieved |  |
| 5 | The methods used to collect required information |  |
| 6 | The procedures to be followed to access information systems |  |
| 7 | The types of problems that occur with information systems and who to report them to |  |
| 8 | The reasons why data needs to be destructed following legal and organisational procedures and standards |  |

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# Supplementary evidence

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| **Evidence** | **Date** |
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| 4 |  |  |
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| **Assessor feedback on completion of the unit** |
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