

Unit PPL1FOH1 (HL3R 04) Process Information for the Reception Function

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 taking and receiving business telephone calls. It is for people that deal with customers both over the telephone and face to face. 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). |

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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** | | **Scope/Range** |
| **What you must do:** | | **What you must cover** |
| There must be evidence for all Performance Criteria (PC). The assessor **must** assess Performance Criteria (PC) 1-5, 7-11, 14, 15 and 16 by directly observing the candidate’s work. PCs 6, 12, 13, and 17 may be assessed by alternative methods if observation is not possible. | | **All** scope/range must be covered. There must be performance evidence, gathered through direct observation by the assessor of the candidate’s work for: |
| **Deal with incoming and outgoing telephone calls**  **1 Answer the telephone promptly, using your organisation's style.**  **2 Identify the caller and determine their requirements.**  **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.  **Give people the information they need**  **7 Find out what information is needed.**  **8 Identify the right source for the information.**  **9 Access the information and organise it clearly and logically.**  **10 Give the information to the person who has asked for it within agreed time limits.** | **11 Give only relevant information ensuring that confidentiality is maintained at all times.**  12 Ask for help from an appropriate member of staff when you cannot find the information required.  13 Explain politely to the person asking for the information if you have had problems finding it.  **Do basic number work**  **14 Check numbers to make sure they are accurate and correct.**  **15 Carry out and check basic calculations.**  **16 Present the results of your checks and calculations neatly and clearly.**  17 Report any errors or things that do not match to the appropriate member of staff promptly. | dealing with telephone calls to and from **both:**  (a) people inside the organisation  (b) people outside the organisation  **two** information sources from:  (c) within the organisation  (d) external sources  (e) own notes  **one** from providing information to:  (f) someone inside the organisation  (g) someone outside the organisation  carrying out basic calculations by **both:**  (h) addition, subtraction, multiplication and division of whole numbers  (i) addition, subtraction, multiplication and division of money to two decimal places  Evidence for the remaining points under ‘what you must cover’ may be assessed through questioning or witness testimony. |

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| **Evidence reference** | **Evidence description** | **Date** | **Performance criteria** | | | | | | | | | | | | | | | | |
| **What you must do** | | | | | | | | | | | | | | | | |
| **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **11** | **12** | **13** | **14** | **15** | **16** | **17** |
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| **Evidence reference** | **Evidence description** | **Date** | **Scope/Range** | | | | | | | | |
| **What you must cover** | | | | | | | | |
| **a** | **b** | **c** | **d** | **e** | **f** | **g** | **h** | **i** |
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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). | |
|  | **For the whole unit** |  |
| 1 | Your organisation's style for answering and making telephone calls and why it is important to use this |  |
| 2 | How to establish a rapport and goodwill with people on the telephone |  |
| 3 | The different types of telephone equipment in your workplace and how to use it |  |
| 4 | Why it is important to communicate effectively and efficiently |  |
| 5 | How to listen, interpret, extract and record information |  |
|  | **Deal with incoming and outgoing telephone calls** |  |
| 6 | How quickly you should answer the telephone |  |
| 7 | Why it is important to establish a rapport and goodwill with callers |  |
| 8 | How to compose messages accurately and effectively |  |
|  | **Give people the information they need** |  |
| 9 | Why it is important to interpret information and instructions correctly |  |
| 10 | Sources of information you can use to help deal with queries |  |
| 11 | Your organisation's policies and procedures for confidentiality and why you must follow these |  |
| 12 | Basic legal requirements for data protection |  |
|  | **Do basic number work** |  |
| 13 | How to add, subtract, multiply and divide numbers |  |
| 14 | How to check figures against other sources of information |  |
| 15 | How to confirm figures are accurate |  |
| 16 | What the procedures are for forwarding checked items |  |
| 17 | What the reporting procedures are for inconsistencies |  |

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# Supplementary evidence

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