

# Specification

Edexcel NVQ/competence-  
based qualifications

**Edexcel Level 2 NVQ Award/Certificate/Diploma in  
Business and Administration (QCF)**

For first registration October 2010

Edexcel, a Pearson company, is the UK's largest awarding organisation offering vocational and academic qualifications and testing, to employers, training providers, colleges, schools, and other places of learning in the UK, and in over 85 countries worldwide.

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# Contents

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<b>Qualification titles covered by this specification</b>	<b>1</b>
<b>Key features of the Edexcel Level 2 NVQ Award/Certificate/Diploma in Business and Administration (QCF)</b>	<b>3</b>
What is the purpose of these qualifications?	3
Who are these qualifications for?	3
What are the benefits of these qualifications to the learner and employer?	4
What are the potential job roles for those working towards these qualifications?	4
What progression opportunities are available to learners who achieve these qualifications?	4
<b>What is the qualification structure for the Edexcel Level 2 NVQ Award in Business and Administration (QCF)?</b>	<b>5</b>
<b>What is the qualification structure for the Edexcel Level 2 NVQ Certificate in Business and Administration (QCF)?</b>	<b>7</b>
<b>What is the qualification structure for the Edexcel Level 2 NVQ Diploma in Business and Administration (QCF)?</b>	<b>11</b>
<b>Forbidden Combinations in the Edexcel Level 2 NVQ Certificate and the Edexcel Level 2 NVQ Diploma in Business and Administration</b>	<b>16</b>
<b>How are the qualifications graded and assessed?</b>	<b>19</b>
Assessment strategy	19
Types of evidence	20
<b>What do you need to offer these qualifications?</b>	<b>21</b>
Centre recognition	21
Approvals agreement	21
<b>Quality assurance</b>	<b>21</b>
<b>What resources are required to deliver these qualifications?</b>	<b>21</b>
<b>Unit format</b>	<b>22</b>
<b>Units</b>	<b>23</b>
Unit 1: Manage Own Performance in a Business Environment	25
Unit 2: Improve Own Performance in a Business Environment	31
Unit 3: Work in a Business Environment	37
Unit 4: Communicate in a Business Environment	43

Unit 5:	Solve Business Problems	51
Unit 6:	Work with Other People in a Business Environment	57
Unit 7:	Contribute to Running a Project	65
Unit 8:	Produce Documents in a Business Environment	73
Unit 9:	Prepare Text from Notes	79
Unit 10:	Prepare Text from Notes Using Touch Typing (40 wpm)	83
Unit 11:	Prepare Text from Shorthand (60 wpm)	87
Unit 12:	Prepare Text from Recorded Audio Instruction (40 wpm)	91
Unit 13:	Design and Produce Documents in a Business Environment	95
Unit 14:	Prepare Text from Notes using Touch Typing (60 wpm)	101
Unit 15:	Prepare Text from Shorthand (80 wpm)	105
Unit 16:	Prepare Text from Recorded Audio Instruction (60 wpm)	109
Unit 17:	Support the Organisation of an Event	113
Unit 18:	Support the Co-ordination of an Event	119
Unit 19:	Support the Organisation of Business Travel or Accommodation	123
Unit 20:	Support the Organisation of Meetings	129
Unit 21:	Plan and Organise an Event	135
Unit 22:	Co-ordinate an Event	141
Unit 23:	Plan and Organise Meetings	147
Unit 24:	Make and Receive Telephone Calls	155
Unit 25:	Use Electronic Message Systems	161
Unit 26:	Use Diary Systems	165
Unit 27:	Take Minutes	169
Unit 28:	Develop a Presentation	175
Unit 29:	Deliver a Presentation	179
Unit 30:	Handle Mail	185
Unit 31:	Provide Reception Services	191
Unit 32:	Meet and Welcome Visitors	197
Unit 33:	Deliver, Monitor and Evaluate Customer Service to Internal Customers	201
Unit 34:	Deliver, Monitor and Evaluate Customer Service to External Customers	207
Unit 35:	Organise and Report Data	213
Unit 36:	Research Information	217
Unit 37:	Store and Retrieve Information	221

Unit 38: Archive Information	225
Unit 39: Support the Management and Development of an Information System	231
Unit 40: Support the Design and Development of an Information System	237
Unit 41: Monitor Information Systems	241
Unit 42: Analyse and Report Data	247
Unit 43: Use Office Equipment	251
Unit 44: Maintain and Issue Stationery Stock Items	257
Unit 45: Order Products and Services	263
Unit 46: Agree a Budget	269
Unit 47: Respond to Change in a Business Environment	273
Unit 48: Contribute to Innovation in a Business Environment	279
Unit 49: Administer Human Resources Records	285
Unit 50: Administer the Recruitment and Selection Process	289
Unit 51: Administer Parking Dispensations	297
Unit 52: Use Occupational and Safety Guidelines when using Keyboards	303
Unit 53: Bespoke Software (Level 1)	307
Unit 54: Data Management Software (Level 1)	311
Unit 55: Database Software (Level 1)	315
Unit 56: Improving Productivity Using IT (Level 1)	319
Unit 57: IT Security for Users (Level 1)	323
Unit 58: Presentation Software (Level 1)	327
Unit 59: Set up an IT System (Level 1)	331
Unit 60: Spreadsheet Software (Level 1)	335
Unit 61: Using Collaborative Technologies (Level 1)	339
Unit 62: Website Software (Level 1)	343
Unit 63: Word Processing Software (Level 1)	347
Unit 64: Bespoke Software (Level 2)	351
Unit 65: Data Management Software (Level 2)	355
Unit 66: Database Software (Level 2)	359
Unit 67: Improving Productivity Using IT (Level 2)	363
Unit 68: IT Security for Users (Level 2)	367
Unit 69: Presentation Software (Level 2)	371
Unit 70: Set up an IT System (Level 2)	375
Unit 71: Spreadsheet Software (Level 2)	379

Unit 72: Using Collaborative Technologies (Level 2)	383
Unit 73: Website Software (Level 2)	389
Unit 74: Word Processing Software (Level 2)	393
<b>Further information</b>	<b>397</b>
<b>Useful publications</b>	<b>397</b>
How to obtain National Occupational Standards	397
<b>Professional development and training</b>	<b>398</b>
<b>Annexe A: Progression pathways</b>	<b>399</b>
The Edexcel qualification framework for the Business and Administration and Team Leading and Management sectors	399
<b>Annexe B: Quality assurance</b>	<b>403</b>
Key principles of quality assurance	403
Quality assurance processes	403
<b>Annexe C: Centre certification and registration</b>	<b>405</b>
What are the access arrangements and special considerations for the qualifications in this specification?	405
<b>Annexe D: Assessment strategies</b>	<b>407</b>
Assessment Strategy for Business and Administration NVQs	407
Assessment Strategy for Information Technology Qualifications (ITQ) May 2009	409
Assessment Roles and Quality Assurance	412

## Qualification titles covered by this specification

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This specification gives you the information you need to offer the Edexcel Level 2 NVQ Award/Certificate/Diploma in Business and Administration (QCF):

<b>Qualification title</b>	<b>Qualification Accreditation Number (QAN)</b>	<b>Accreditation start date</b>
Edexcel Level 2 NVQ Award in Business and Administration (QCF)	500/9585/7	1 August 2010
Edexcel Level 2 NVQ Certificate in Business and Administration (QCF)	500/9636/9	1 August 2010
Edexcel Level 2 NVQ Diploma in Business and Administration (QCF)	500/9860/3	1 August 2010

These qualifications have been accredited within the Qualifications and Credit Framework (QCF) and are eligible for public funding as determined by the Department for Education (DfE) under Sections 96 and 97 of the Learning and Skills Act 2000.

The qualification titles listed above feature in the funding lists published annually by the DfE and the regularly updated website. They will also appear on the Learning Aims Database (LAD), where relevant.

You should use the QCF Qualification Accreditation Number (QAN), when you wish to seek public funding for your learners. Each unit within a qualification will also have a unique QCF reference number, which is listed in this specification.

The QCF qualification title and unit reference numbers will appear on the learners' final certification document. Learners need to be made aware of this when they are recruited by the centre and registered with Edexcel.

These titles replace the following qualification from August 2010:

<b>Qualification title</b>	<b>Qualification Accreditation Number (QAN)</b>	<b>Accreditation start date</b>	<b>Accreditation end date</b>
Edexcel Level 2 NVQ in Business and Administration	100/5193/4	1 August 2005	31 July 2010



# Key features of the Edexcel Level 2 NVQ Award/Certificate/Diploma in Business and Administration (QCF)

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These qualifications:

- are nationally recognised
- are based on the Business and Administration National Occupational Standards (NOS). The NOS, assessment strategy and qualification structure(s) are owned by The Council for Administration.

The Edexcel Level 2 NVQ Certificate in Business and Administration has been approved as a component required for the Level 2 Business and Administration Apprenticeship framework.

The Edexcel Level 2 NVQ Diploma in Business and Administration will be accepted as a proxy qualification on the Level 2 Business and Administration Apprenticeship framework, and apprenticeships including this qualification will be certificated.

## What is the purpose of these qualifications?

These qualifications are designed for learners employed in administrative roles, for example administrative assistants or team administrators, who need to develop or consolidate their skills.

Learners are required to take mandatory units which cover aspects of working and communicating in a business environment. Learners then have a choice of option units covering different functional areas such as work responsibilities, document production, events and meetings, communications or customer service. There is a wide range of option units allowing learners to choose units to meet the needs of their own work role.

## Who are these qualifications for?

The Edexcel Level 2 NVQ Award/Certificate in Business and Administration (QCF) are for all learners aged 14 and above who are capable of reaching the required standards.

The Edexcel Level 2 NVQ Diploma in Business and Administration (QCF) is for all learners aged 16 and above who are capable of reaching the required standards.

Edexcel's policy is that the qualifications should:

- be free from any barriers that restrict access and progression
- ensure equality of opportunity for all wishing to access the qualifications.

## **What are the benefits of these qualifications to the learner and employer?**

These qualifications are work-based qualifications, which allows learners to develop knowledge, understanding and skills essential for working in a business and administration environment, such as communication skills, working with others and managing and improving own performance.

## **What are the potential job roles for those working towards these qualifications?**

- Administrative assistant/administrator
- Civil Service administrative assistant/officer
- Payroll clerk/supervisor/manager
- School administrative assistant
- Secretary

## **What progression opportunities are available to learners who achieve these qualifications?**

These qualifications will allow learners to progress within employment to administrative positions such as team administrators, and roles in specific areas such as arranging meetings and customer service.

Learners may progress to other Level 2 qualifications such as the Edexcel BTEC Level 2 Certificate in Principles of Business and Administration, or the Edexcel BTEC Level 2 Certificate/Extended Certificate/Diploma in Business. Learners can also progress to a Level 2 Apprenticeship in Business and Administration.

Learners can also progress to Level 3 qualifications such as the Edexcel Level 3 NVQ Certificate or Diploma in Business and Administration, the Edexcel BTEC Level 3 Certificate in Principles of Business and Administration or to the Edexcel BTEC Level 3 Subsidiary Diploma/Diploma/Extended Diploma in Business. Learners can also progress to the Level 3 Apprenticeship in Business and Administration.

Further information is available in *Annexe A*.

# What is the qualification structure for the Edexcel Level 2 NVQ Award in Business and Administration (QCF)?

Individual units can be found in the *Units* section. The QCF level and credit value are given on the first page of each unit.

To achieve an Edexcel Level 2 NVQ Award in Business and Administration (QCF), learners must complete a **minimum of 9 credits**, of which at least **six credits** must be selected from **level 2 units**:

- **5 credits** must be completed from **GROUP A MANDATORY UNITS**; and
- a **minimum of 4 credits** from **GROUP B OPTIONAL UNITS**.

Level	Unit Reference Number	Unit Title	Credits	GLH
<b>Group A: Mandatory Units (5 credits)</b>				
2	F/601/2470	Unit 3: Work in a Business Environment	2	18
2	D/601/2475	Unit 4: Communicate in a Business Environment	3	18
<b>Group B: Optional Units (minimum of 4 credits)</b>				
<b>B1: Work Responsibilities</b>				
2	F/601/2467	Unit 1: Manage own Performance in a Business Environment	2	9
2	L/601/2469	Unit 2: Improve own Performance in a Business Environment	2	6
2	L/601/2472	Unit 5: Solve Business Problems	4	12
2	Y/601/2474	Unit 6: Work with Other People in a Business Environment	3	10
<b>B2: Document Production</b>				
2	T/601/2482	Unit 8: Produce Documents in a Business Environment	4	15
2	A/601/2483	Unit 9: Prepare Text from Notes*	3	15
2	F/601/2484	Unit 10: Prepare Text from Notes Using Touch Typing (40 wpm)*	3	15
2	J/601/2485	Unit 11: Prepare Text from Shorthand (60 wpm)	8	55
2	L/601/2486	Unit 12: Prepare Text from Recorded Audio Instruction (40 wpm)	4	35

Level	Unit Reference Number	Unit Title	Credits	GLH
<b>B3: Events And Meetings</b>				
2	L/601/2505	Unit 17: Support the Organisation of an Event	2	15
2	D/601/2508	Unit 18: Support the Co-Ordination of an Event	3	20
2	Y/601/2510	Unit 19: Support the Organisation of Business Travel or Accommodation	3	18
2	T/601/2515	Unit 20: Support the Organisation of Meetings	4	18
<b>B4: Communications</b>				
1	K/601/2446	Unit 24: Make and Receive Telephone Calls	3	10
2	H/601/2476	Unit 25: Use Electronic Message Systems	1	6
2	K/601/2477	Unit 26: Use Diary Systems	3	9
2	M/601/2478	Unit 27: Take Minutes	4	15
<b>B5: CUSTOMER SERVICE</b>				
2	T/601/2479	Unit 30: Handle Mail	3	17
2	K/601/2480	Unit 31: Provide Reception Services*	3	15
2	Y/601/2457	Unit 32: Meet and Welcome Visitors*	3	23
<b>B6: Manage Information And Data</b>				
2	R/601/2487	Unit 35: Organise and Report Data	3	12
2	Y/601/2488	Unit 36: Research Information	4	17
2	R/601/2490	Unit 37: Store and Retrieve Information	3	17
2	Y/601/2491	Unit 38: Archive Information	2	13
2	J/601/2518	Unit 39: Support the Management and Development of an Information System	7	40
<b>B7: Business Resources</b>				
2	H/601/2493	Unit 43: Use Office Equipment	4	18
2	M/601/2495	Unit 44: Maintain and Issue Stationery Stock Items	3	14
<b>B8: Innovation And Change</b>				
2	F/601/2517	Unit 47: Respond to Change in a Business Environment	3	16
<b>B9: Health, Safety And Security Of People, Premises And Property</b>				
1	T/601/2465	Unit 52: Use Occupational and Safety Guidelines When Using Keyboards	2	20

\* These units have forbidden combinations in place, see pages 16-18 for details.

# What is the qualification structure for the Edexcel Level 2 NVQ Certificate in Business and Administration (QCF)?

Individual units can be found in the *Units* section. The QCF level and credit value are given on the first page of each unit.

To achieve an Edexcel Level 2 NVQ Certificate in Business and Administration (QCF), you must complete a **minimum of 21 credits**, of which at least **14 credits** must be selected from **level 2 units**:

**9 credits** must be completed from **GROUP A MANDATORY UNITS**; and, a **minimum of 7 credits** from **GROUP B OPTIONAL UNITS** a **maximum of 5 credits** from **GROUP C OPTIONAL UNITS**.

Level	Unit Reference Number	Unit Title	Credits	GLH
<b>Group A: Mandatory Units (9 credits)</b>				
2	F/601/2467	Unit 1: Manage own Performance in a Business Environment	2	9
2	L/601/2469	Unit 2: Improve own Performance in a Business Environment	2	6
2	F/601/2470	Unit 3: Work in a Business Environment	2	18
2	D/601/2475	Unit 4: Communicate in a Business Environment	3	18
<b>Group B: Optional Units (Minimum of 7 credits)</b>				
<b>B1: Work Responsibilities</b>				
2	L/601/2472	Unit 5: Solve Business Problems	4	12
2	Y/601/2474	Unit 6: Work with Other People in a Business Environment	3	10
<b>B2: Project Management</b>				
3	J/601/2549	Unit 7: Contribute to Running a Project	5	30
<b>B3: Document Production</b>				
2	T/601/2482	Unit 8: Produce Documents in a Business Environment*	4	15
2	A/601/2483	Unit 9: Prepare Text from Notes*	3	15
2	F/601/2484	Unit 10: Prepare Text from Notes using Touch Typing (40 wpm)*	3	15
2	J/601/2485	Unit 11: Prepare Text from Shorthand (60 wpm)*	8	55
2	L/601/2486	Unit 12: Prepare Text from Recorded Audio Instruction (40 wpm)*	4	35

Level	Unit Reference Number	Unit Title	Credits	GLH
3	M/601/2531	Unit 13: Design and Produce Documents in a Business Environment*	4	25
3	T/601/2532	Unit 14: Prepare Text from Notes Using Touch Typing (60 wpm)*	4	10
3	A/601/2533	Unit 15: Prepare Text from Shorthand (80 wpm)*	8	45
3	F/601/2534	Unit 16: Prepare Text from Recorded Audio Instruction (60 wpm)*	4	25
<b>B4: Events and Meetings</b>				
2	L/601/2505	Unit 17: Support the Organisation of An Event*	2	15
2	D/601/2508	Unit 18: Support the Co-Ordination of An Event*	3	20
2	Y/601/2510	Unit 19: Support the Organisation of Business Travel Or Accommodation	3	18
2	T/601/2515	Unit 20: Support the Organisation of Meetings*	4	18
3	R/601/2540	Unit 21: Plan and Organise an Event*	4	28
3	Y/601/2541	Unit 22: Co-Ordinate an Event*	4	30
3	D/601/2542	Unit 23: Plan and Organise Meetings*	5	25
<b>B5: Communications</b>				
1	K/601/2446	Unit 24: Make and Receive Telephone Calls	3	10
2	H/601/2476	Unit 25: Use Electronic Message Systems	1	6
2	K/601/2477	Unit 26: Use Diary Systems	3	9
2	M/601/2478	Unit 27: Take Minutes	4	15
3	M/601/2528	Unit 28: Develop a Presentation	3	15
3	T/601/2529	Unit 29: Deliver a Presentation	3	15
<b>B6: Customer Service</b>				
2	T/601/2479	Unit 30: Handle Mail	3	17
2	K/601/2480	Unit 31: Provide Reception Services*	3	15
2	Y/601/2457	Unit 32: Meet and Welcome Visitors*	3	23
3	A/601/2550	Unit 33: Deliver, Monitor and Evaluate Customer Service to Internal Customers	3	12
3	F/601/2551	Unit 34: Deliver, Monitor and Evaluate Customer Service to External Customers	3	12

Level	Unit Reference Number	Unit Title	Credits	GLH
<b>B7: Manage Information and Data</b>				
2	R/601/2487	Unit 35: Organise and Report Data	3	12
2	Y/601/2488	Unit 36: Research Information	4	17
2	R/601/2490	Unit 37: Store and Retrieve Information	3	17
2	Y/601/2491	Unit 38: Archive Information	2	13
2	J/601/2518	Unit 39: Support the Management and Development of an Information System	7	40
3	L/601/2536	Unit 40: Support the Design and Development of an Information System	7	35
3	R/601/2537	Unit 41: Monitor Information Systems	7	30
3	Y/601/2538	Unit 42: Analyse and Report Data	6	30
<b>B8: Business Resources</b>				
2	H/601/2493	Unit 43: Use Office Equipment	4	18
2	M/601/2495	Unit 44: Maintain and Issue Stationery Stock Items	3	14
3	D/601/2539	Unit 45: Order Products and Services	5	35
3	J/601/2552	Unit 46: Agree a Budget	4	25
<b>B9: Innovation and Change</b>				
2	F/601/2517	Unit 47: Respond to Change in a Business Environment	3	16
3	A/601/2547	Unit 48: Contribute to Innovation in a Business Environment	4	30
<b>B10: Specialised Business Support Services – Human Resources</b>				
2	T/601/2790	Unit 49: Administer Human Resources Records	3	20
2	A/601/2791	Unit 50: Administer the Recruitment and Selection Process	4	30
<b>B11: Specialised Business Support Services – Parking</b>				
2	J/601/2647	Unit 51: Administer Parking Dispensations	4	14
<b>Group C: Optional Units (Maximum of 5 credits)</b>				
<b>C1: Health, Safety and Security of People Premise and Property</b>				
1	T/601/2465	Unit 52: Use Occupational and Safety Guidelines when Using Keyboards	2	20

Level	Unit Reference Number	Unit Title	Credits	GLH
<b>C2: IT</b>				
1	A/502/4395	Unit 53: Bespoke Software*	2	15
1	F/502/4558	Unit 54: Data Management Software*	2	15
1	H/502/4553	Unit 55: Database Software*	3	20
1	T/502/4153	Unit 56: Improving Productivity Using IT*	3	20
1	R/502/4256	Unit 57: IT Security for Users*	1	10
1	K/502/4621	Unit 58: Presentation Software*	3	20
1	Y/502/4209	Unit 59: Set Up an IT System*	3	20
1	A/502/4624	Unit 60: Spreadsheet Software*	3	20
1	A/502/4378	Unit 61: Using Collaborative Technologies*	3	20
1	L/502/4630	Unit 62: Website Software*	3	20
1	L/502/4627	Unit 63: Word Processing Software*	3	20
2	F/502/4396	Unit 64: Bespoke Software*	3	20
2	J/502/4559	Unit 65: Data Management Software*	3	20
2	M/502/4555	Unit 66: Database Software*	4	30
2	J/502/4156	Unit 67: Improving Productivity Using IT*	4	30
2	Y/502/4257	Unit 68: IT Security For Users*	2	15
2	M/502/4622	Unit 69: Presentation Software*	4	30
2	L/502/4210	Unit 70: Set up an IT System*	4	30
2	F/502/4625	Unit 71: Spreadsheet Software*	4	30
2	F/502/4379	Unit 72: Using Collaborative Technologies*	4	30
2	R/502/4631	Unit 73: Website Software*	4	30
2	R/502/4628	Unit 74: Word Processing Software*	4	30

\* These units have forbidden combinations in place, see pages 16-18 for details.



# What is the qualification structure for the Edexcel Level 2 NVQ Diploma in Business and Administration (QCF)?

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Individual units can be found in the *Units* section. The QCF level and credit value are given on the first page of each unit.

To achieve an Edexcel Level 2 NVQ Diploma in Business and Administration (QCF), you must complete a **minimum of 37 credits**, of which at least **24 credits** must be selected from **units at level 2**:

**9 credits** must be completed from **GROUP A: MANDATORY UNITS**;

a **minimum of 17 credits** from **GROUP B: OPTIONAL UNITS**

a **maximum of 11 credits** from **GROUP C: OPTIONAL UNITS**.

Level	Unit Reference Number	Unit Title	Credits	GLH
<b>Group A: Mandatory Units (9 credits)</b>				
2	F/601/2467	Unit 1: Manage own Performance in a Business Environment	2	9
2	L/601/2469	Unit 2: Improve own Performance in a Business Environment	2	6
2	F/601/2470	Unit 3: Work in a Business Environment	2	18
2	D/601/2475	Unit 4: Communicate in a Business Environment	3	18
<b>Group B: Optional Units (Minimum of 17 credits)</b>				
<b>B1: Work Responsibilities</b>				
2	L/601/2472	Unit 5: Solve Business Problems	4	12
2	Y/601/2474	Unit 6: Work with Other People in a Business Environment	3	10
<b>B2: Project Management</b>				
3	J/601/2549	Unit 7: Contribute to Running a Project	5	30

Level	Unit Reference Number	Unit Title	Credits	GLH
<b>B3: Document Production</b>				
2	T/601/2482	Unit 8: Produce Documents in a Business Environment*	4	15
2	A/601/2483	Unit 9: Prepare Text from Notes*	3	15
2	F/601/2484	Unit 10: Prepare Text from Notes using Touch Typing (40 wpm)*	3	15
2	J/601/2485	Unit 11: Prepare Text from Shorthand (60 wpm)*	8	55
2	L/601/2486	Unit 12: Prepare Text from Recorded Audio Instruction (40 wpm)*	4	35
3	M/601/2531	Unit 13: Design and Produce Documents in a Business Environment*	4	25
3	T/601/2532	Unit 14: Prepare Text from Notes Using Touch Typing (60 wpm)*	4	10
3	A/601/2533	Unit 15: Prepare Text from Shorthand (80 wpm)*	8	45
3	F/601/2534	Unit 16: Prepare Text from Recorded Audio Instruction (60 wpm)*	4	25
<b>B4: Events and Meetings</b>				
2	L/601/2505	Unit 17: Support the Organisation of an Event*	2	15
2	D/601/2508	Unit 18: Support the Co-Ordination of an Event*	3	20
2	Y/601/2510	Unit 19: Support the Organisation of Business Travel or Accommodation	3	18
2	T/601/2515	Unit 20: Support the Organisation of Meetings*	4	18
3	R/601/2540	Unit 21: Plan and Organise an Event	4	28
3	Y/601/2541	Unit 22: Co-Ordinate an Event*	4	30
3	D/601/2542	Unit 23: Plan and Organise Meetings*	5	25
<b>B5: Communications</b>				
1	K/601/2446	Unit 24: Make and Receive Telephone Calls	3	10
2	H/601/2476	Unit 25: Use Electronic Message Systems	1	6
2	K/601/2477	Unit 26: Use Diary Systems	3	9
2	M/601/2478	Unit 27: Take Minutes	4	15
3	M/601/2528	Unit 28: Develop a Presentation	3	15
3	T/601/2529	Unit 29: Deliver a Presentation	3	15

Level	Unit Reference Number	Unit Title	Credits	GLH
<b>B6: Customer Service</b>				
2	T/601/2479	Unit 30: Handle Mail	3	17
2	K/601/2480	Unit 31: Provide Reception Services*	3	15
2	Y/601/2457	Unit 32: Meet and Welcome Visitors*	3	23
3	A/601/2550	Unit 33: Deliver, Monitor And Evaluate Customer Service To Internal Customers	3	12
3	F/601/2551	Unit 34: Deliver, Monitor and Evaluate Customer Service to External Customers	3	12
<b>B7: Manage Information and Data</b>				
2	R/601/2487	Unit 35: Organise and Report Data	3	12
2	Y/601/2488	Unit 36: Research Information	4	17
2	R/601/2490	Unit 37: Store and Retrieve Information	3	17
2	Y/601/2491	Unit 38: Archive Information	2	13
2	J/601/2518	Unit 39: Support the Management and Development of an Information System	7	40
3	L/601/2536	Unit 40: Support the Design and Development of an Information System	7	35
3	R/601/2537	Unit 41: Monitor Information Systems	7	30
3	Y/601/2538	Unit 42: Analyse and Report Data	6	30
<b>B8: Business Resources</b>				
2	H/601/2493	Unit 43: Use Office Equipment	4	18
2	M/601/2495	Unit 44: Maintain and Issue Stationery Stock Items	3	14
3	D/601/2539	Unit 45: Order Products and Services	5	35
3	J/601/2552	Unit 46: Agree a Budget	4	25

Level	Unit Reference Number	Unit Title	Credits	GLH
<b>B9: Innovation and Change</b>				
2	F/601/2517	Unit 47: Respond to Change in a Business Environment	3	16
3	A/601/2547	Unit 48: Contribute to Innovation in a Business Environment	4	30
<b>B10: Specialised Business Support Services – Human Resources</b>				
2	T/601/2790	Unit 49: Administer Human Resources Records	3	20
2	A/601/2791	Unit 50: Administer the Recruitment and Selection Process	4	30
<b>B11: Specialised Business Support Services – Parking</b>				
2	J/601/2647	Unit 51: Administer Parking Dispensations	4	14
<b>Group C: Optional Units (Maximum Of 11 Credits)</b>				
<b>C1: Health, Safety and Security of People Premise and Property</b>				
1	T/601/2465	Unit 52: Use Occupational and Safety Guidelines when Using Keyboards	2	20
<b>C2: IT</b>				
1	A/502/4395	Unit 53: Bespoke Software*	2	15
1	F/502/4558	Unit 54: Data Management Software*	2	15
1	H/502/4553	Unit 55: Database Software*	3	20
1	T/502/4153	Unit 56: Improving Productivity Using IT*	3	20
1	R/502/4256	Unit 57: IT Security For Users*	1	10
1	K/502/4621	Unit 58: Presentation Software*	3	20
1	Y/502/4209	Unit 59: Set up an IT System*	3	20
1	A/502/4624	Unit 60: Spreadsheet Software*	3	20
1	A/502/4378	Unit 61: Using Collaborative Technologies*	3	20
1	L/502/4630	Unit 62: Website Software*	3	20
1	L/502/4627	Unit 63: Word Processing Software*	3	20
2	F/502/4396	Unit 64: Bespoke Software*	3	20
2	J/502/4559	Unit 65: Data Management Software*	3	20
2	M/502/4555	Unit 66: Database Software*	4	30
2	J/502/4156	Unit 67: Improving Productivity Using IT*	4	30
2	Y/502/4257	Unit 68: IT Security for Users*	2	15

<b>Level</b>	<b>Unit Reference Number</b>	<b>Unit Title</b>	<b>Credits</b>	<b>GLH</b>
2	M/502/4622	Unit 69: Presentation Software*	4	30
2	L/502/4210	Unit 70: Set up an IT System*	4	30
2	F/502/4625	Unit 71: Spreadsheet Software*	4	30
2	F/502/4379	Unit 72: Using Collaborative Technologies*	4	30
2	R/502/4631	Unit 73: Website Software*	4	30
2	R/502/4628	Unit 74: Word Processing Software*	4	30

\* These units have forbidden combinations in place, see pages 16-18 for details.

## Forbidden Combinations in the Edexcel Level 2 NVQ Certificate and the Edexcel Level 2 NVQ Diploma in Business and Administration

The following table sets out the forbidden combinations of units in these qualifications.

<b>Unit</b>	<b>Must not be taken with:</b>
Unit 8: Produce Documents in a Business Environment (T/601/2482)	Unit 13: Design and Produce Documents in a Business Environment (M/601/2531)
Unit 9: Prepare Text from Notes (A/601/2483)	Unit 10: Prepare Text from Notes using Touch Typing (40 wpm) (F/601/2484) Unit 14: Prepare Text from Notes using Touch Typing (60 wpm) (T/601/2532)
Unit 10: Prepare Text from Notes using Touch Typing (40 wpm) (F/601/2484)	Unit 9: Prepare Text from Notes (A/601/2483) Unit 14: Prepare Text from Notes using Touch Typing (60 wpm) (T/601/2532)
Unit 11: Prepare Text from Shorthand (60 wpm) (J/601/2485)	Unit 15: Prepare Text from Shorthand (80 wpm) (A/601/2533)
Unit 12: Prepare Text from Recorded Audio Instruction (40 wpm) (L/601/2486)	Unit 16: Prepare Text from Recorded Audio Instruction (60 wpm) (F/601/2534)
Unit 13: Design and Produce Documents in a Business Environment (M/601/2531)	Unit 8: Produce Documents in a Business Environment (T/601/2482)
Unit 14: Prepare Text from Notes using Touch Typing (60 wpm) (T/601/2532)	Unit 9: Prepare Text from Notes (A/601/2483) Unit 10: Prepare Text from Notes using Touch Typing (40 wpm) (F/601/2484)
Unit 15: Prepare Text from Shorthand (80 wpm) (A/601/2533)	Unit 11: Prepare Text from Shorthand (60 wpm) (J/601/2485)
Unit 16: Prepare Text from Recorded Audio Instruction (60 wpm) (F/601/2534)	Unit 12: Prepare Text from Recorded Audio Instruction (40 wpm) (L/601/2486)
Unit 17: Support the Organisation of an Event (L/601/2505)	Unit 21: Plan and Organise an Event (R/601/2540)
Unit 18: Support the Co-ordination of an Event (D/601/2508)	Unit 22: Co-ordinate an Event (Y/601/2541)

<b>Unit</b>	<b>Must not be taken with:</b>
Unit 20: Support the Organisation of Meetings (T/601/2515)	Unit 23: Plan and Organise Meetings (D/601/2542)
Unit 21: Plan and Organise an Event (R/601/2540)	Unit 17: Support the Organisation of an Event (L/601/2505)
Unit 22: Co-ordinate an Event (Y/601/2541)	Unit 18: Support the Co-ordination of an Event (D/601/2508)
Unit 23: Plan and Organise Meetings (D/601/2542)	Unit 20: Support the Organisation of Meetings (T/601/2515)
Unit 31: Provide Reception Services (K/601/2480)	Unit 32: Meet and Welcome Visitors (Y/601/2457)
Unit 32: Meet and Welcome Visitors (Y/601/2457)	Unit 31: Provide Reception Services (K/601/2480)
Unit 53: Bespoke Software (Level 1) (A/502/4395)	Unit 64: Bespoke Software (Level 2) (F/502/4396)
Unit 54: Data Management Software (Level 1) (F/502/4558)	Unit 65: Data Management Software (Level 2) (J/502/4559)
Unit 55: Database Software (Level 1) (H/502/4553)	Unit 66: Database Software (Level 2) (M/502/4555)
Unit 56: Improving Productivity Using IT (Level 1) (T/502/4153)	Unit 67: Improving Productivity Using IT (Level 2) (J/502/4156)
Unit 57: IT Security for Users (Level 1) (R/502/4256)	Unit 68: IT Security for Users (Level 2) (Y/502/4257)
Unit 58: Presentation Software (Level 1) (K/502/4621)	Unit 69: Presentation Software (Level 2) (M/502/4622)
Unit 59: Set up an IT System (Level 1) (Y/502/4209)	Unit 70: Set up an IT System (Level 2) (L/502/4210)
Unit 60: Spreadsheet Software (Level 1) (A/502/4624)	Unit 71: Spreadsheet Software (Level 2) (F/502/4625)
Unit 61: Using Collaborative Technologies (Level 1) (A/502/4378)	Unit 72: Using Collaborative Technologies (Level 2) (F/502/4379)
Unit 62: Website Software (Level 1) (L/502/4630)	Unit 73: Website Software (Level 2) (R/502/4631)
Unit 63: Word Processing Software (Level 1) (L/502/4627)	Unit 74: Word Processing Software (Level 2) (R/502/4628)
Unit 64: Bespoke Software (Level 2) (F/502/4396)	Unit 53: Bespoke Software (Level 1) (A/502/4395)

<b>Unit</b>	<b>Must not be taken with:</b>
Unit 65: Data Management Software (Level 2) (J/502/4559)	Unit 54: Data Management Software (Level 1) (F/502/4558)
Unit 66: Database Software (Level 2) (M/502/4555)	Unit 55: Database Software (Level 1) (H/502/4553)
Unit 67: Improving Productivity Using IT (Level 2) (J/502/4156)	Unit 56: Improving Productivity Using IT (Level 1) (T/502/4153)
Unit 68: IT Security for Users (Level 2) (Y/502/4257)	Unit 57: IT Security for Users (Level 1) (R/502/4256)
Unit 69: Presentation Software (Level 2) (M/502/4622)	Unit 58: Presentation Software (Level 1) (K/502/4621)
Unit 70: Set up an IT System (Level 2) (L/502/4210)	Unit 59: Set up an IT System (Level 1) (Y/502/4209)
Unit 71: Spreadsheet Software (Level 2) (F/502/4625)	Unit 60: Spreadsheet Software (Level 1) (A/502/4624)
Unit 72: Using Collaborative Technologies (Level 2) (F/502/4379)	Unit 61: Using Collaborative Technologies (Level 1) (A/502/4378)
Unit 73: Website Software (Level 2) (R/502/4631)	Unit 62: Website Software (Level 1) (L/502/4630)
Unit 74: Word Processing Software (Level 2) (R/502/4628)	Unit 63: Word Processing Software (Level 1) (L/502/4627)



## How are the qualifications graded and assessed?

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The overall grade for each qualification is a 'pass'. The learner must achieve all the required units within the specified qualification structure.

To pass a unit the learner must:

- achieve **all** the specified learning outcomes
- satisfy **all** the assessment criteria by providing sufficient and valid evidence for each criterion
- show that the evidence is their own.

The qualifications are designed to be assessed:

- in the workplace or
- in conditions resembling the workplace, as specified in the assessment requirements/strategy for the sector, or
- as part of a training programme.

### Assessment strategy

The assessment strategy for the NVQs in Business and Administration has been included in *Annexe D*. It has been developed by the Council for Administration in partnership with employers, training providers, awarding organisations and the regulatory authorities. The assessment strategy includes details on:

- external quality control
- assessment of performance
- simulation of NVQ units
- occupational expertise to assess performance, and moderate and verify assessments.

Several units have been imported from the Information Technology qualifications (ITQs) developed by Eskills, the SSC for the IT sector. The Assessment Strategy for the ITQ units has also been included in *Annexe D*.

Evidence of competence may come from:

- **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
- the **Recognition of Prior Learning (RPL)** where a learner can demonstrate that they can meet the assessment criteria within a unit through knowledge, understanding or skills they already possess without undertaking a course of learning. They must submit sufficient, reliable and valid evidence for internal and standards verification purposes. RPL is acceptable for accrediting a unit, several units or a whole qualification
- a **combination** of these.

It is important that the evidence is:

<b>Valid</b>	relevant to the standards for which competence is claimed
<b>Authentic</b>	produced by the learner
<b>Current</b>	sufficiently recent to create confidence that the same skill, understanding or knowledge persist at the time of the claim
<b>Reliable</b>	indicates that the learner can consistently perform at this level
<b>Sufficient</b>	fully meets the requirements of the standards.

## Types of evidence

To successfully achieve a unit the learner must gather evidence which shows that they have met the required standard in the assessment criteria. Evidence can take a variety of different forms including the following examples:

- direct observation of the learner's performance by their assessor (O)
- outcomes from oral or written questioning (Q&A)
- products of the learner's work (P)
- personal statements and/or reflective accounts (RA)
- outcomes from simulation, where permitted by the assessment strategy (S)
- professional discussion (PD)
- assignment, project/case studies (A)
- authentic statements/witness testimony (WT)
- expert witness testimony (EPW)
- evidence of Recognition of Prior Learning (RPL).

Learners can use one piece of evidence to prove their knowledge, skills and understanding across different assessment criteria and/or across different units. It is, therefore, not necessary for learners to have each assessment criterion assessed separately. Learners should be encouraged to reference the assessment criteria to which the evidence relates.

Evidence must be made available to the assessor, internal verifier and Edexcel standards verifier. A range of recording documents is available on the Edexcel website [www.edexcel.com](http://www.edexcel.com). Alternatively, centres may develop their own.

## What do you need to offer these qualifications?

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### Centre recognition

Centres that have not previously offered Edexcel qualifications need to apply for and be granted centre recognition as part of the process for approval to offer individual qualifications. New centres must complete both a centre recognition approval application and a qualification approval application.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by the new qualification and the conditions for automatic approval are met. Centres already holding Edexcel approval are able to gain qualification approval for a different level or different sector via Edexcel online.

### Approvals agreement

All centres are required to enter into an approvals agreement which is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any linked codes or regulations. Edexcel will act to protect the integrity of the awarding of qualifications, if centres do not comply with the agreement. This could result in the suspension of certification or withdrawal of approval.

## Quality assurance

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Detailed information on Edexcel's quality assurance processes is given in *Annexe B*.

## What resources are required to deliver these qualifications?

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Each qualification is designed to support learners working in the Business and Administration sector. Physical resources need to support the delivery of the qualifications and the assessment of the learning outcomes and must be of industry standard. Centres must meet any specific resource requirements outlined in *Annexe D: Assessment strategy*. Staff assessing the learner must meet the requirements within the overarching assessment strategy for the sector.

# Unit format

Each unit in this specification contains the following sections.

<b>Unit title:</b>					The unit title is accredited on the QCF and this form of words will appear on the learner's Notification of Performance (NOP).
<b>Unit code:</b>					This is the unit owner's reference number for the specified unit.
<b>Unit reference number:</b>					This code is a unique reference number for the unit.
<b>QCF level:</b>					All units and qualifications within the QCF have a level assigned to them, which represents the level of achievement. There are nine levels of achievement, from Entry level to level 8. The level of the unit has been informed by the QCF level descriptors and, where appropriate, the NOS and/or other sector/professional.
<b>Credit value:</b>					All units have a credit value. The minimum credit value is one, and credits can only be awarded in whole numbers. Learners will be awarded credits when they achieve the unit.
<b>Guided learning hours:</b>					A notional measure of the substance of a qualification. It includes an estimate of the time that might be allocated to direct teaching or instruction, together with other structured learning time, such as directed assignments, assessments on the job or supported individual study and practice. It excludes learner-initiated private study.
<b>Unit summary:</b>					This provides a summary of the purpose of the unit.
<b>Assessment requirements/evidence requirements:</b>					The assessment/evidence requirements are determined by the SSC. Learners must provide evidence for each of the requirements stated in this section.
<b>Assessment methodology:</b>					This provides a summary of the assessment methodology to be used for the unit.
<b>Learning outcomes:</b>	<b>Assessment criteria:</b>	<b>Evidence type:</b>	<b>Portfolio reference:</b>	<b>Date:</b>	
			The learner should use this box to indicate where the evidence can be obtained eg portfolio page number.	The learner should give the date when the evidence has been provided.	
Learning outcomes state exactly what a learner should know, understand or be able to do as a result of completing a unit.		The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or a set of learning outcomes, has been achieved.		Learners must reference the type of evidence they have and where it is available for quality assurance purposes. The learner can enter the relevant key and a reference. Alternatively, the learner and/or centre can devise their own referencing system.	

# Units



## Unit 1: **Manage Own Performance in a Business Environment**

Unit code:	Q201
Unit reference number:	F/601/2467
QCF level:	2
Credit value:	2
Guided learning hours:	9

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### Unit summary

This unit is about managing and being accountable for your own work.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 - 1.10	Evidence may be supplied via candidate reports/reflective accounts, professional discussion and questioning
2	2.1 - 2.7	
3	3.1 - 3.5	Evidence may be supplied via observation of workplace activities, witness testimony and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• appraisals</li><li>• performance reviews</li><li>• letters</li><li>• emails</li><li>• memos</li><li>• messages</li><li>• minutes of meetings</li><li>• to do lists</li><li>• work diaries</li><li>• action plans</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	3.6	<p>Evidence may be supplied via witness testimony, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> <li>• appraisals</li> <li>• performance reviews</li> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• messages</li> <li>• to do lists</li> <li>• work diaries</li> <li>• action plans</li> </ul>
	3.7	<p>Evidence may be supplied via witness testimony, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> <li>• appraisals</li> <li>• performance reviews</li> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• messages</li> </ul>
	3.8	<p>Evidence may be supplied via witness testimony, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> <li>• appraisals</li> <li>• performance reviews</li> </ul>



Learning outcomes	Assessment criteria	Assessment guidance
4	4.1 4.3	Evidence may be supplied via witness testimony, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• appraisals</li> <li>• performance reviews.</li> </ul>
	4.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• appraisals</li> <li>• performance reviews</li> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• messages</li> <li>• minutes of meetings</li> <li>• to do lists</li> <li>• work diaries</li> <li>• action plans.</li> </ul>
	4.4 - 4.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• messages</li> <li>• minutes of meetings.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q202, Q203, Q204, Q205, Q227.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Understand how to plan work and be accountable to others</p>	<p>1.1 Outline guidelines, procedures and codes of practice relevant to personal work</p> <p>1.2 Explain the purpose of planning work, and being accountable to others for own work</p> <p>1.3 Explain the purpose and benefits of agreeing realistic targets for work</p> <p>1.4 Explain how to agree realistic targets</p> <p>1.5 Describe ways of planning work to meet agreed deadlines</p> <p>1.6 Explain the purpose of keeping other people informed about progress</p> <p>1.7 Explain the purpose and benefits of letting other people know work plans need to be changed</p> <p>1.8 Describe types of problems that may occur during work</p> <p>1.9 Describe ways of seeking assistance with getting help to resolve problems</p> <p>1.10 Explain the purpose and benefits of recognising and learning from mistakes</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to behave in a way that supports effective working	2.1 Explain the purpose and benefits of agreeing and setting high standards for own work 2.2 Describe ways of setting high standards for work 2.3 Explain the purpose and benefits of taking on new challenges if they arise 2.4 Explain the purpose and benefits of adapting to change 2.5 Explain the purpose and benefits of treating others with honesty, respect and consideration 2.6 Explain why own behaviour in the workplace is important 2.7 Describe types of behaviour at work that show honesty, respect and consideration and those that do not			
3 Be able to plan and be responsible for own work, supported by others	3.1 Agree realistic targets and achievable timescales for own work 3.2 Plan work tasks to make best use of own time and available resources 3.3 Confirm effective working methods with others 3.4 Identify and report problems occurring in own work, using the support of other people when necessary 3.5 Keep other people informed of progress			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Behave in a way that supports effective working	3.6 Complete work tasks to agreed deadlines or re-negotiate timescales and plans in good time 3.7 Take responsibility for own work and accept responsibility for any mistakes made 3.8 Follow agreed work guidelines, procedures and, where needed, codes of practice 4.1 Set high standards for own work and show commitment to achieving these standards 4.2 Agree to take on new challenge(s) if they arise 4.3 Adapt to new ways of working 4.4 Treat other people with honesty, respect and consideration 4.5 Help and support other people in work tasks			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

## Unit 2: Improve Own Performance in a Business Environment

Unit code:	Q202
Unit reference number:	L/601/2469
QCF level:	2
Credit value:	2
Guided learning hours:	6

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### Unit summary

This unit is about identifying ways of improving performance at work by encouraging feedback from others and maintaining a learning plan to record new learning and career opportunities.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.5	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning
2	2.1	Evidence may be supplied via observation of workplace activities, witness testimony learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role
	2.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	2.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• tasks completed</li> </ul>
	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos.</li> </ul>
3	3.2 3.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• learning plan</li> <li>• appraisal</li> <li>• performance reviews.</li> </ul>
	3.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• learning plan.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q203, Q205.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand how to improve own performance	<p>1.1 Explain the purpose and benefits of continuously improving performance at work</p> <p>1.2 Explain the purpose and benefits of encouraging and accepting feedback from others</p> <p>1.3 Explain how learning and development can improve own work, benefit organisations, and identify career options</p> <p>1.4 Describe possible career progression routes</p> <p>1.5 Describe possible development opportunities</p>			
2 Be able to improve own performance using feedback	<p>2.1 Encourage and accept feedback from other people</p> <p>2.2 Use feedback to agree ways to improve own performance in the workplace</p> <p>2.3 Complete work tasks, using feedback given, to improve performance</p>			
3 Be able to agree own development needs using a learning plan	<p>3.1 Investigate and agree where further learning and development may improve own work performance</p> <p>3.2 Confirm learning plan changes</p> <p>3.3 Follow a learning plan</p> <p>3.4 Review progress against learning plan and agree further learning updates, if required</p>			



Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(if sampled)



## Unit 3: Work in a Business Environment

Unit code:	Q203
Unit reference number:	F/601/2470
QCF level:	2
Credit value:	2
Guided learning hours:	18

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### Unit summary

This unit is about being able to behave, and make contributions to work tasks and procedures, in a business environment, in ways that support diversity, security and confidentiality at work, reduce waste and improve efficiency.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.4	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.4	
3	3.1 – 3.6	
4	4.1 – 4.2	
5	5.1 – 5.2	
6	6.1 – 6.2 6.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.

Learning outcomes	Assessment criteria	Assessment guidance
	6.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• minutes of meetings</li> <li>• memos</li> <li>• emails</li> <li>• appraisals</li> <li>• performance reviews.</li> </ul>
7	7.1 – 7.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.
8	8.1 – 8.4	

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q205.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand how to respect other people at work	<p>1.1 Describe what is meant by diversity and why it should be valued</p> <p>1.2 Describe how to treat other people in a way that is sensitive to their needs</p> <p>1.3 Describe how to treat other people in a way that respects their abilities, background, values, customs and beliefs</p> <p>1.4 Describe ways in which it possible to learn from others at work</p>			
2 Understand how to maintain security and confidentiality at work and deal with concerns	<p>2.1 Describe the purpose and benefits of maintaining security and confidentiality at work</p> <p>2.2 Describe requirements for security and confidentiality in an organisation</p> <p>2.3 Describe legal requirements for security and confidentiality, as required</p> <p>2.4 Describe procedures for dealing with concerns about security and confidentiality in an organisation</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Understand the purpose and procedures for keeping waste to a minimum in a business environment	3.1 Explain the purpose of keeping waste to a minimum 3.2 Describe the main causes of waste that may occur in a business environment 3.3 Describe ways of keeping waste to a minimum 3.4 Identify ways of using technology to reduce waste 3.5 Outline the purpose and benefits of recycling 3.6 Describe organisational procedures for recycling materials			
4 Understand procedures for disposal of hazardous materials	4.1 Describe the benefits of procedures for the recycling and disposal of hazardous materials 4.2 Describe organisational procedures for the recycling and disposal of hazardous materials			
5 Know how to support sustainability in an organisation	5.1 Outline the purpose of improving efficiency and minimising waste 5.2 Describe ways of improving own working methods and use of technology to achieve efficiency and reduce waste			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
6 Be able to respect and support other people at work in an organisation	<p>6.1 Complete work tasks alongside other people in a way that shows respect for</p> <ul style="list-style-type: none"> <li>a) backgrounds</li> <li>b) abilities</li> <li>c) values, customs and beliefs</li> </ul> <p>6.2 Complete work tasks with other people in a way that is sensitive to their needs</p> <p>6.3 Use feedback and guidance from other people to improve own way of working</p> <p>6.4 Follow organisational procedures and legal requirements in relation to discrimination legislation, as required</p>			
7 Be able to maintain security and confidentiality	<p>7.1 Keep property secure, following organisational procedures and legal requirements, as required</p> <p>7.2 Keep information secure and confidential, following organisational procedures and legal requirements</p> <p>7.3 Follow organisational procedures to report concerns about security / confidentiality, as required</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
8 Be able to support sustainability and minimise waste in an organisation	8.1 Complete work tasks, keeping waste to a minimum 8.2 Use technology in work task(s) in ways that minimise waste 8.3 Follow procedures for recycling and disposal of hazardous materials, as required 8.4 Follow procedures for the maintenance of equipment in own work			

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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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*(if sampled)*



## Unit 4: Communicate in a Business Environment

Unit code:	Q206
Unit reference number:	D/601/2475
QCF level:	2
Credit value:	3
Guided learning hours:	18

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### Unit summary

This unit is about being able to communicate clearly and accurately, in writing and verbally, with other people in a business environment.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.4	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.10	
3	3.1 – 3.4	
4	4.1 – 4.2	
5	5.1 – 5.3	
6	6.1	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• information selected.</li></ul>

<b>Learning outcomes</b>	<b>Assessment criteria</b>	<b>Assessment guidance</b>
	6.2 – 6.5 6.7 – 6.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• information formatted.</li> </ul>
	6.6	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
7	7.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• presentation.</li> </ul>
	7.2 7.4 – 7.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• minutes of meetings.</li> </ul>
	7.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.
8	8.1	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• feedback received.</li> </ul>
	8.2	Evidence may be supplied via learner reports/reflective accounts.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the purpose of planning communication	<p>1.1 Explain reasons for knowing the purpose of communication</p> <p>1.2 Explain reasons for knowing the audience to whom the communication is being presented</p> <p>1.3 Describe different methods of communication</p> <p>1.4 Describe when to use different methods of communication</p>			
2 Understand how to communicate in writing	<p>2.1 Identify different sources of information that may be used when preparing written communication</p> <p>2.2 Describe the communication principles for using electronic forms of written communication in a business environment</p> <p>2.3 Describe the reasons for using language that suits the purpose of written communication</p> <p>2.4 Describe ways of organising, structuring and presenting written information so it meets the needs of an audience</p> <p>2.5 Describe ways of checking for the accuracy of written information</p> <p>2.6 Explain the purpose of accurate use of grammar, punctuation and spelling</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.7 Explain what is meant by plain English, and why it is used 2.8 Explain the need to proofread and check written work 2.9 Explain how to identify work that is important and work that is urgent 2.10 Describe organisational procedures for saving and filing written communications			
3	Understand how to communicate verbally  3.1 Describe ways of verbally presenting information and ideas clearly 3.2 Explain ways of making contributions to discussions that help to move them forward 3.3 Describe methods of active listening 3.4 Explain the purpose of summarising verbal communications			
4	Understand the purpose of feedback in developing communication skills  4.1 Describe ways of getting feedback on communications 4.2 Explain the purpose of using feedback to develop communication skills			
5	Be able to plan communication  5.1 Identify the purpose of communications and the audience(s) 5.2 Select methods of communication to be used 5.3 Confirm methods of communication, as required			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>6 Be able to communicate in writing</p>	<p>6.1 Find and select information needed for written communications</p> <p>6.2 Organise, structure and present information so that it is clear, accurate and meets the needs of the audience</p> <p>6.3 Use language that suits the purpose of written communication and the audience</p> <p>6.4 Use accurate grammar, spelling and punctuation, and plain English to make sure that meaning is clear</p> <p>6.5 Proofread and check written communications and make amendments, as required</p> <p>6.6 Confirm what is important and what is urgent</p> <p>6.7 Produce written communications to meet agreed deadlines</p> <p>6.8 Keep a file copy of written communications sent</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
7 Be able to communicate verbally	7.1 Verbally present information and ideas to others clearly and accurately 7.2 Make contributions to discussion(s) that move the discussion forward 7.3 Actively listen to information given by other people, and make relevant responses 7.4 Ask relevant questions to clarify own understanding, as required 7.5 Summarise verbal communication(s) and agree that the correct meaning has been understood			
8 Be able to identify and agree ways of developing communication skills	8.1 Get feedback to confirm whether the communication has achieved its purpose 8.2 Use feedback to identify and agree ways of improving own communication skills			

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## Unit 5: Solve Business Problems

Unit code:	Q204
Unit reference number:	L/601/2472
QCF level:	2
Credit value:	4
Guided learning hours:	12

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### Unit summary

This unit is about recognising that there is a problem with the way work is being carried out in a business environment and working with other people to agree a solution.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 - 1.2	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 - 2.5	
3	3.1 - 3.2	
4	4.1 - 4.2	Evidence may be supplied via learner reports/reflective accounts.
	4.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• minutes of meetings</li><li>• memos</li><li>• emails.</li></ul>
5	5.1 - 5.3	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts.

Learning outcomes	Assessment criteria	Assessment guidance
	5.4 – 5.9	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• minutes of meetings</li> <li>• memos</li> <li>• emails.</li> </ul>
6	6.1 – 6.3	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts.

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Know how to recognise business problems and their causes	<p>1.1 Outline ways of recognising when a business problem exists</p> <p>1.2 Describe how to identify possible causes of business problems</p>			
2 Understand techniques for solving business problems	<p>2.1 Describe different ways of solving a business problem</p> <p>2.2 Outline different ways of planning to solve a business problem</p> <p>2.3 Give reasons for having support and feedback from others when solving the business problem</p> <p>2.4 Explain the purpose of checking progress and adjusting approaches to solving a business problem</p> <p>2.5 Describe ways of recognising when a business problem has been solved</p>			
3 Know how to review approaches and solutions to business problems	<p>3.1 Outline ways of reviewing approaches to solving business problems</p> <p>3.2 Outline ways of reviewing the effectiveness of solutions to business problems</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to recognise business problems	4.1 Identify a business problem 4.2 Confirm own understanding of a business problem 4.3 Work with others to agree what the business problem is			
5 Be able to plan and carry out a solution to a business problem	5.1 Agree an approach for how to solve the business problem 5.2 Develop a plan to solve the business problem 5.3 Identify ways of deciding that the business problem has been solved 5.4 Agree approaches to solving the business problem, with others as required 5.5 Carry out a plan to solve the business problem, involving others as required 5.6 Use support and feedback from others to reach a solution 5.7 Check progress towards solving the business problem 5.8 Use feedback and progress reports to adjust the plan, as required 5.9 Confirm that the business problem has been solved, with others as required			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
6 Be able to review a solution to the business problem	6.1 Review an approach to solving a business problem for its effectiveness 6.2 Review a solution to the business problem for its effectiveness 6.3 Identify alternative approaches and solutions for possible effectiveness			

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Internal verifier signature: \_\_\_\_\_

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

(if sampled)



## Unit 6: **Work with Other People in a Business Environment**

Unit code:	Q205
Unit reference number:	Y/601/2474
QCF level:	2
Credit value:	3
Guided learning hours:	10

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### Unit summary

This unit is about working within a team, sharing responsibility with others to make sure that a team can achieve agreed goals and objectives.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.8	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning
2	2.1 – 2.6	
3	3.1 – 3.2	
4	4.1 – 4.3	
5	5.1 – 5.2	
6	6.1 – 6.2	
7	7.1 – 7.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role

<b>Learning outcomes</b>	<b>Assessment criteria</b>	<b>Assessment guidance</b>
	7.3 – 7.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
8	8.1 – 8.4	<ul style="list-style-type: none"> <li>• minutes of meetings</li> <li>• memos</li> <li>• letters</li> <li>• emails.</li> </ul>
	8.5 – 8.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.
9	9.1 – 9.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
10	10.1	<ul style="list-style-type: none"> <li>• minutes of meetings</li> <li>• memos</li> <li>• emails.</li> </ul>
	10.2 – 10.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• minutes of meetings</li> <li>• memos</li> <li>• emails</li> <li>• appraisals</li> <li>• performance reviews.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.



## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Understand how your role fits with organisational values and practices</p>	<p>1.1 Describe the sector in which your organisation operates</p> <p>1.2 Describe your organisation's missions and purpose</p> <p>1.3 Compare your organisation to other types of organisation in your sector</p> <p>1.4 Outline your responsibilities</p> <p>1.5 Describe how your role fits into your organisation's structure</p> <p>1.6 Describe how your role contributes to the organisation's operations</p> <p>1.7 Outline the policies, procedures, systems and values of your organisation that are relevant to your role</p> <p>1.8 Outline who you would consult if unsure about organisational policies, procedures, systems and values</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to work as part of a team to achieve goals and objectives	2.1 Explain the purpose of working with other people to achieve goals and objectives 2.2 Identify situations in which working with others can achieve positive results 2.3 Explain the purpose and benefits of agreeing work goals and plans when working with others 2.4 Describe situations in which team members might support each other 2.5 Describe ways of providing support to other people in a team 2.6 Explain the purpose of agreeing quality measures with a team			
3 Understand how to communicate as part of a team	3.1 Explain the purpose of communicating with other people in a team 3.2 Identify different methods of communication and when to use them			
4 Understand the contribution of individuals within a team	4.1 Explain the purpose of recognising the strengths of others 4.2 Explain the value of diversity within teams 4.3 Explain the purpose of respecting individuals working within a team			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Understand how to deal with problems and disagreements	5.1 Describe the types of problems and disagreements that may occur when working with other people in a team 5.2 Describe ways of dealing with problems and disagreements when working with other people in a team			
6 Understand the purpose of feedback when working as a team	6.1 Explain the purpose of giving and receiving constructive feedback 6.2 Describe ways of using feedback to improve own work, and a team as a whole			
7 Be able to work in a way that fits with organisational values and practices	7.1 Follow organisational policies, systems and procedures relevant to your role 7.2 Apply relevant organisational values across all aspects of your work 7.3 Work with outside organisations and individuals in a way that protects the image of your organisation, when relevant 7.4 Seek guidance when unsure about organisational policies, systems, procedures and values			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
8 Be able to work in a team to achieve goals and objectives	8.1 Communicate effectively with other people in a team 8.2 Contribute to the agreement of work objectives and quality measures with a team, to achieve a positive outcome 8.3 Make sure work goals and objectives are achieved in a way that makes best use of own abilities in a team 8.4 Provide support to members of a team, if required 8.5 Show respect for individuals in a team 8.6 Make sure own work meets agreed quality standards and is on time			
9 Be able to deal with or refer problems in a team	9.1 Identify problem(s) or disagreement(s) in a team 9.2 Resolve problem(s) or disagreement(s) within limits of own authority and experience 9.3 Refer problems, as required			
10 Be able to use feedback on objectives in a team	10.1 Contribute to providing constructive feedback on the achievement of objectives to a team 10.2 Receive constructive feedback on own work 10.3 Use feedback on achievement of objectives to identify improvements in own work			

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(if sampled)



## Unit 7: Contribute to Running a Project

Unit code:	Q327
Unit reference number:	J/601/2549
QCF level:	3
Credit value:	5
Guided learning hours:	30

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### Unit summary

This unit is about contributing to achieving a project's agreed aims and objectives as it impacts on stakeholders.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.8	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.7	
3	3.1 – 3.3	
4	4.1 – 4.2 4.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos</li><li>• minutes of meetings.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	4.3	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• specifications.</li> </ul>
	4.5	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• critical path analysis</li> <li>• GANTT charts.</li> </ul>
	4.6	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• risks identified</li> <li>• contingency plans.</li> </ul>
5	5.1 5.5	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.</p>



Learning outcomes	Assessment criteria	Assessment guidance
	5.2 5.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• minutes of meetings.</li> </ul>
	5.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• minutes of meetings</li> <li>• adapted plans.</li> </ul>
	5.4 5.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• minutes of meetings</li> <li>• reports.</li> </ul>

Learning outcomes	Assessment criteria	Assessment guidance
6	6.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• minutes of meetings.</li> </ul>
	6.2 – 6.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• minutes of meetings</li> <li>• reports.</li> </ul>

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Understand how to contribute to agree to a project brief</p>	<p>1.1 Describe the difference between routine work and taking part in a project</p> <p>1.2 Explain the advantages and disadvantages of using projects and when projects are appropriate</p> <p>1.3 Explain the project-planning methodologies appropriate to the types of projects run and the tools that can be used to assist project planning and control</p> <p>1.4 Explain the purpose and benefits of identifying stakeholders involved in the project</p> <p>1.5 Explain the purpose of contributing to agreeing a project's purpose, scope, timescale, costs, aims and objectives</p> <p>1.6 Explain the purpose of agreeing a budget for a project</p> <p>1.7 Describe how to estimate types and quantity of resources needed to run a project</p> <p>1.8 Describe how to identify project risks and develop contingency plans, if required</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Understand how to contribute to a project</p>	<p>2.1 Describe the types of information needed to monitor projects and the methods that can be used to give information</p> <p>2.2 Describe how to estimate and control resources in an area of work during a project</p> <p>2.3 Explain the purpose of reporting own progress during a project</p> <p>2.4 Outline reasons for seeking advice in response to unexpected events</p> <p>2.5 Explain the purpose and benefits of contributing towards achieving projects within agreed timescales</p> <p>2.6 Explain the purpose and benefits of keeping records of all project activity within the scope of own work</p> <p>2.7 Describe different ways of communicating with those involved in or affected by a project to make sure it runs smoothly</p>			
<p>3 Understand the purpose of contributing to the evaluation of a project</p>	<p>3.1 Describe different types of methods available to monitor projects</p> <p>3.2 Explain the purpose of making own contributions when evaluating projects</p> <p>3.3 Describe how to learn lessons for the future for own work</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to contribute to preparing and planning a project	<p>4.1 Confirm the purpose of the project with all stakeholders</p> <p>4.2 Confirm project scope, timescale, aims and objectives</p> <p>4.3 Contribute to the preparation of a project specification</p> <p>4.4 Confirm all types of resources for all stakeholders</p> <p>4.5 Confirm with all stakeholders, the project plan and timed use of all types of resources for an area of work</p> <p>4.6 Contribute to identifying risks and develop contingency plans for an area of work</p>			
5 Be able to contribute to running a project	<p>5.1 Implement a project</p> <p>5.2 Communicate with all stakeholders involved with or affected by a project</p> <p>5.3 Adapt project plans for stakeholders to respond to unexpected events and risks</p> <p>5.4 Provide interim reports on project progress to relevant stakeholders</p> <p>5.5 Achieve required outcomes for relevant stakeholders on time and to budget</p> <p>5.6 Seek advice in response to unexpected events, if required</p> <p>5.7 Keep records of project activity</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
6 Be able to contribute to evaluating the outcomes of a project	6.1 Evaluate project for all stakeholders 6.2 Report on the degree to which a project met its aims and objectives for all stakeholders 6.3 Report on project strengths and areas for improvement for all stakeholders			

Learner name: \_\_\_\_\_

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

Assessor signature: \_\_\_\_\_

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

Internal verifier signature: \_\_\_\_\_

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

*(if sampled)*

## Unit 8: Produce Documents in a Business Environment

Unit code:	Q212
Unit reference number:	T/601/2482
QCF level:	2
Credit value:	4
Guided learning hours:	15

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### Unit summary

This unit is about preparing high quality and attractive documents to agreed layouts, formats and styles to meet agreed deadlines.

#### Forbidden combination

This unit must not be taken with Unit 13: *Design and Produce Documents in a Business Environment (M/601/2531)*.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.3	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.3	
3	3.1 – 3.7	
4	4.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
5	5.1 – 5.3 5.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.
	5.4 – 5.7 5.9 – 5.10	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• documents produced.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.



## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the purpose of producing high quality and attractive documents in a business environment	<p>1.1 Outline different types of documents that may be produced and the different styles that could be used</p> <p>1.2 Describe different formats in which text may be presented</p> <p>1.3 Explain the purpose and benefits of producing high quality and attractive documents</p>			
2 Know the resources and technology available and how to use them when producing documents in a business environment	<p>2.1 Describe the types of resources available for producing high quality and attractive documents</p> <p>2.2 Outline ways of using different resources to produce documents</p> <p>2.3 Describe different types of technology available for inputting, formatting and editing text, and their main features</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Understand the purpose of following procedures when producing documents in a business environment</p>	<p>3.1 Explain the benefits of agreeing the purpose, content, style, and deadlines for producing documents</p> <p>3.2 Outline different ways of organising content needed for documents</p> <p>3.3 Outline ways of integrating and laying out text and non-text</p> <p>3.4 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so</p> <p>3.5 Explain the purpose of storing documents safely and securely, and ways of doing so</p> <p>3.6 Explain the purpose of confidentiality and data protection when preparing documents</p> <p>3.7 Explain the purpose and benefits of meeting deadlines</p>			
<p>4 Be able to prepare for tasks</p>	<p>4.1 Confirm the purpose, content, style and deadlines for documents</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to produce documents to agreed specifications	5.1 Prepare resources needed to produce documents 5.2 Organise the content required to produce documents 5.3 Make use of technology, as required 5.4 Format and produce documents to an agreed style 5.5 Integrate non-text objects into an agreed layout, if required 5.6 Check texts for accuracy 5.7 Edit and correct texts, as required 5.8 Clarify document requirements, when necessary 5.9 Store documents safely and securely following organisational procedures 5.10 Present documents to the required format and within the agreed deadlines			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 (if sampled)



## Unit 9: Prepare Text from Notes

Unit code:	Q213
Unit reference number:	A/601/2483
QCF level:	2
Credit value:	3
Guided learning hours:	15

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### Unit summary

This unit is about preparing different types of text from own notes and notes written by other people to meet agreed timescales.

### Forbidden Combination

This unit must not be taken with units:

Unit 10: *Prepare Text from Notes using Touch Typing (40 wpm)* (F/601/2484)

Unit 14: *Prepare Text from Notes using Touch Typing (60 wpm)* (T/601/2532).

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.2	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.6	
3	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
4	4.1 – 4.2 4.4 – 4.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>documents produced.</li> </ul>
	4.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>letters</li> <li>emails</li> <li>memos.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand preparing text from notes	<p>1.1 Describe different types of documents that may be produced from notes and the formats to be followed</p> <p>1.2 Explain the difference between producing text from own notes and producing text from others' notes</p>			
2 Understand the purpose and benefits of following procedures when preparing text from notes	<p>2.1 Explain the benefits of agreeing the purpose, format and deadline for preparing text from notes</p> <p>2.2 Explain the purpose of accuracy – including spelling, grammar and punctuation – when preparing text from notes</p> <p>2.3 Describe ways of checking finished documents for accuracy and correctness, and the purpose of doing so</p> <p>2.4 Explain the purpose of storing text and notes safely and securely, and ways of doing so</p> <p>2.5 Explain the purpose of confidentiality and data protection when preparing text from notes</p> <p>2.6 Explain the purpose and benefits of meeting deadlines</p>			
3 Be able to prepare for text from notes	<p>3.1 Agree the purpose, format and deadlines for texts</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to prepare text from notes	4.1 Input text using keyboard skills 4.2 Format text to agreed style and layout, making efficient use of available technology 4.3 Clarify text requirements when necessary 4.4 Read and check texts for accuracy 4.5 Edit and correct texts, as required 4.6 Store texts and original notes safely and securely following organisational procedures 4.7 Produce texts to the required format and within agreed deadlines			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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



## Unit 10: Prepare Text from Notes Using Touch Typing (40 wpm)

Unit code:	Q214
Unit reference number:	F/601/2484
QCF level:	2
Credit value:	3
Guided learning hours:	15

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### Unit summary

This unit is about preparing different types of text using touch typing at a minimum speed of 40 words per minute.

### Forbidden combination

This unit must not be taken with units:

Unit 9: *Prepare Text from Notes (A/601/2483)*

Unit 14: *Prepare Text from Notes using Touch Typing (60 wpm) (T/601/2532)*

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.3	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.6	
3	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
4	4.1 – 4.2 4.4 – 4.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>documents produced.</li> </ul>
	4.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>letters</li> <li>emails</li> <li>memos.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the task of preparing text from notes using touch typing	<p>1.1 Describe different types of documents that may be produced from notes and the formats to be followed</p> <p>1.2 Describe different forms in which texts may be presented</p> <p>1.3 Explain the difference between producing text from own notes and producing text from others' notes</p>			
2 Understand the purpose and benefits of following procedures when preparing text using touch typing	<p>2.1 Explain the value and benefits of agreeing the purpose, format and deadline for delivering text</p> <p>2.2 Explain the purpose of accuracy – including spelling, grammar and punctuation – when preparing text typed from notes</p> <p>2.3 Describe ways of checking finished documents for accuracy and correctness</p> <p>2.4 Explain the purpose of storing text and original notes safely and securely, and ways of doing so</p> <p>2.5 Explain the purpose of confidentiality and data protection when preparing text from notes</p> <p>2.6 Explain the purpose of meeting deadlines</p>			
3 Be able to prepare for tasks	<p>3.1 Agree the purpose, format and deadlines for texts</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Be able to produce texts using touch typing</p>	<p>4.1 Input texts using touch typing to a minimum speed of 40 words per minute</p> <p>4.2 Format texts to agreed style and layout making efficient use of available technology</p> <p>4.3 Clarify text requirements when necessary</p> <p>4.4 Read and check texts for accuracy</p> <p>4.5 Edit and correct texts, as required</p> <p>4.6 Store texts and original notes safely and securely following organisational procedures</p> <p>4.7 Present texts to the required format, within the agreed deadlines</p>			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

## Unit 11: Prepare Text from Shorthand (60 wpm)

Unit code:	Q215
Unit reference number:	J/601/2485
QCF level:	2
Credit value:	8
Guided learning hours:	55

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### Unit summary

This unit is about preparing different types of text from shorthand notes, where the notes are taken at a minimum speed of 60 words per minute.

#### Forbidden combination

This unit must not be taken with Unit 15: *Prepare Text from Shorthand (80 wpm)* (A/601/2533).

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.2	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.5	
3	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	3.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>shorthand notes.</li> </ul>
4	4.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and learner reports/reflective accounts.
	4.2 – 4.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>documents produced.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the task of preparing text from shorthand	<p>1.1 Describe different types of documents that may be produced from shorthand and the formats to be followed</p> <p>1.2 Describe different forms in which texts may be presented</p>			
2 Understand the purpose and value of following procedures when preparing text from shorthand	<p>2.1 Explain the value and benefits of agreeing the purpose, format and deadline for preparing texts from shorthand</p> <p>2.2 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so</p> <p>2.3 Explain the purpose of storing texts and original shorthand notes safely and securely, and ways of doing so</p> <p>2.4 Explain the purpose of confidentiality and data protection when preparing texts from shorthand notes</p> <p>2.5 Explain the purpose and benefits of meeting deadlines</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to prepare for tasks, and use shorthand to take dictation	3.1 Agree the purpose, format, and deadlines for preparing texts from shorthand 3.2 Take dictation using shorthand at a minimum speed of 60 words per minute			
4 Be able to produce texts from shorthand	4.1 Clarify text requirements, when necessary 4.2 Input and format texts to an agreed format from shorthand notes 4.3 Make efficient use of technology, as required 4.4 Read and check texts for accuracy 4.5 Edit and correct texts, as required 4.6 Store texts and original shorthand notes safely and securely following organisational procedures 4.7 Present texts to the required format and within the agreed deadlines			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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



## Unit 12: Prepare Text from Recorded Audio Instruction (40 wpm)

Unit code:	Q216
Unit reference number:	L/601/2486
QCF level:	2
Credit value:	4
Guided learning hours:	35

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### Unit summary

This unit is about preparing different types of text from audio recordings, where the recording is made at a minimum speed of 40 words per minute.

#### Forbidden combination

This unit must not be taken with Unit 16: *Prepare Text from Recorded Audio Instruction (60 wpm) (F/601/2534)*.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.3	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.5	
3	3.1 3.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	3.2 – 3.3 3.5 – 3.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>documents produced.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the task of preparing text from recorded audio instruction	<p>1.1 Describe different types of documents that may be produced from recorded audio and the formats to be followed</p> <p>1.2 Describe different forms in which texts may be presented</p> <p>1.3 Describe the different types of technology that are available for playing back recordings and their main features</p>			
2 Understand the purpose and value of following procedures when preparing text from recorded audio instruction	<p>2.1 Explain the value and benefits of agreeing the purpose, format and deadline for preparing texts from recorded audio instruction</p> <p>2.2 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so</p> <p>2.3 Explain the purpose of storing texts and original recordings safely and securely, and ways of doing so</p> <p>2.4 Explain the purpose of confidentiality and data protection when preparing texts from recorded audio</p> <p>2.5 Explain the purpose and benefits of meeting deadlines</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to produce texts from audio recordings	3.1 Agree the purpose, format, and deadlines for texts 3.2 Input text from audio recordings at a minimum speed of 40 words per minute 3.3 Format texts to agreed format making efficient use of available technology 3.4 Clarify text requirements when necessary 3.5 Read and check texts for accuracy 3.6 Edit and correct texts, as required 3.7 Store texts and original recordings safely and securely following organisational procedures 3.8 Present texts to the required format and within the agreed deadlines			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 (*if sampled*)

## Unit 13: Design and Produce Documents in a Business Environment

Unit code:	Q312
Unit reference number:	M/601/2531
QCF level:	3
Credit value:	4
Guided learning hours:	25

### Unit summary

This unit is about designing and preparing high quality and attractive documents to agreed layouts, formats and styles.

#### Forbidden combination

This unit must not be taken with Unit 8: *Produce Documents in a Business Environment* (T/601/2482).

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.3	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.3	
3	3.1 – 3.7	
4	4.1 4.9	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos.</li> </ul>

Learning outcomes	Assessment criteria	Assessment guidance
	4.2 – 4.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role.
	4.5 – 4.8 4.10 – 4.11	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• documents produced.</li> </ul>

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the purpose and value of designing and producing high quality and attractive documents	<p>1.1 Describe different types of documents that may be designed and produced and the different styles that could be used</p> <p>1.2 Describe different formats in which text may be presented</p> <p>1.3 Explain the purpose and benefits of designing and producing high quality and attractive documents</p>			
2 Know the resources available to design and produce documents and how to use them	<p>2.1 Describe the types of resources needed to design and produce high quality and attractive documents</p> <p>2.2 Explain the purpose and benefits of using different types of resource to design and produce high quality and attractive documents</p> <p>2.3 Describe different types of technology available for inputting, formatting and editing text, and their main features</p>			
3 Understand the purpose and value of following procedures when designing and producing documents	<p>3.1 Explain the value and benefits of agreeing the purpose, content, style, and deadlines for the design and production of documents</p> <p>3.2 Describe ways of researching and organising content needed for documents</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to design and produce documents to agreed specifications	3.3 Describe ways of integrating and laying out text and non-text 3.4 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so 3.5 Explain the purpose of storing documents safely and securely, and ways of doing so 3.6 Explain the purpose of confidentiality and data protection when preparing documents 3.7 Explain the purpose and benefits of meeting deadlines 4.1 Agree the purpose, content, style and deadlines for documents 4.2 Identify and prepare resources needed to design and produce documents 4.3 Research and organise the content required for documents 4.4 Make appropriate and efficient use of technology, as required 4.5 Design, format and produce documents to an agreed style			



Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	4.6 Integrate non-text objects into an agreed layout, if required 4.7 Check texts and objects for accuracy 4.8 Edit and correct texts and objects as required 4.9 Clarify document requirements, if necessary 4.10 Store documents safely and securely following organisational procedures 4.11 Present documents to the required format, and within the agreed deadlines			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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



## Unit 14: Prepare Text from Notes using Touch Typing (60 wpm)

Unit code:	Q313
Unit reference number:	T/601/2532
QCF level:	3
Credit value:	4
Guided learning hours:	10

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### Unit summary

This unit is about preparing different types of text using touch typing at a minimum speed of 60 words per minute.

### Forbidden combinations

This unit must not be taken with units:

Unit 9: *Prepare Text from Notes (A/601/2483)*

Unit 10: *Prepare Text from Notes using Touch Typing (40 wpm) (F/601/2484)*.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.3	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.6	
3	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
4	4.1 – 4.2 4.4 – 4.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• documents produced.</li> </ul>
	4.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q301, Q302, Q303, Q305.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the task of preparing text from notes using touch typing	<p>1.1 Describe different types of documents that may be produced from notes and the format to be followed</p> <p>1.2 Describe different forms in which texts may be presented</p> <p>1.3 Explain the difference between producing text from own notes and producing text from others' notes</p>			
2 Understand the purpose and benefits of following procedures when preparing text using touch typing	<p>2.1 Explain the value and benefits of agreeing the purpose, format and deadline for texts</p> <p>2.2 Explain the benefits of accuracy – including spelling, grammar and punctuation – when preparing typed text from notes</p> <p>2.3 Describe ways of checking finished documents for accuracy and correctness, and the purpose of doing so</p> <p>2.4 Explain the purpose of storing text and original notes safely and securely, and ways of doing so</p> <p>2.5 Explain the purpose of confidentiality and data protection when preparing text from notes</p> <p>2.6 Explain the purpose and benefits of meeting deadlines</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to prepare for tasks	3.1 Agree the purpose, format and deadlines for texts			
4 Be able to produce texts using touch typing at a minimum speed of 60 wpm	4.1 Input texts using touch typing to a minimum speed of 60 words per minute 4.2 Format texts to agreed format making best use of available technology 4.3 Clarify text requirements when necessary 4.4 Read and check texts for accuracy 4.5 Edit and correct texts, as required 4.6 Store texts and original notes safely and securely following organisational procedures 4.7 Present texts to the required format and within the agreed deadlines			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

## Unit 15: Prepare Text from Shorthand (80 wpm)

Unit code:	Q314
Unit reference number:	A/601/2533
QCF level:	3
Credit value:	8
Guided learning hours:	45

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### Unit summary

This unit is about preparing different types of text from shorthand notes at minimum speed of 80 words per minute.

#### Forbidden combination

This unit must not be taken with Unit 11: *Prepare Text from Shorthand (60 wpm)* (J/601/2485).

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.2	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.5	
3	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	3.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>shorthand notes.</li> </ul>
4	4.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and learner reports/reflective accounts.
	4.2 – 4.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>documents produced.</li> </ul>

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.



## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the task of preparing text from shorthand			
2	Understand the purpose and value of following procedures when preparing text from shorthand			
	1.1 Describe different types of documents that may be produced from shorthand and the formats to be followed			
	1.2 Describe different forms in which shorthand texts may be presented			
	2.1 Explain the value and benefits of agreeing the purpose, format and deadline for texts prepared from shorthand			
	2.2 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so			
	2.3 Explain the purpose of storing text and original shorthand notes safely and securely, and ways of doing so			
	2.4 Explain the purpose of confidentiality and data protection when preparing text from shorthand notes			
	2.5 Explain the purpose and benefits of meeting deadlines			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to prepare for tasks, and use shorthand to take dictation	3.1 Agree the purpose, format, and deadlines for texts 3.2 Take dictation using shorthand at a minimum of 80 words per minute			
4 Be able to produce texts from shorthand	4.1 Get clarification of points as required 4.2 Input and format texts to an agreed format from shorthand notes 4.3 Make efficient use of technology, as required 4.4 Read and check texts for accuracy 4.5 Edit and correct texts, as required 4.6 Store texts and original shorthand notes safely and securely following organisational procedures 4.7 Present texts to the required format, within the agreed deadlines			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

## Unit 16: Prepare Text from Recorded Audio Instruction (60 wpm)

Unit code:	Q315
Unit reference number:	F/601/2534
QCF level:	3
Credit value:	4
Guided learning hours:	25

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### Unit summary

This unit is about preparing different types of text from audio recording at a minimum speed of 60 words per minute.

#### Forbidden combination

This unit must not be taken with Unit 12: Prepare Text from Recorded Audio Instruction (40 wpm) (L/601/2486).

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.3	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.5	
3	3.1 3.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	3.2 – 3.3 3.5 – 3.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• documents produced.</li> </ul>

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the task of preparing text from recorded audio instruction	<p>1.1 Describe different types of documents that may be produced from recorded audio and the formats to be followed</p> <p>1.2 Describe different forms in which texts may be presented</p> <p>1.3 Describe the different types of technology that are available for playing back recordings and their main features</p>			
2 Understand the purpose and value of following procedures when preparing text from recorded audio instruction	<p>2.1 Explain the value and benefits of agreeing the purpose, format and deadline for preparing texts from recorded audio instruction</p> <p>2.2 Describe ways of checking finished documents for accuracy – including spelling, grammar and punctuation – and correctness, and the purpose of doing so</p> <p>2.3 Explain the purpose of storing text and original recordings safely and securely, and ways of doing so</p> <p>2.4 Explain the purpose of confidentiality and data protection when preparing text from recorded audio</p> <p>2.5 Explain the purpose and benefits of meeting deadlines</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to produce texts from audio recordings</p>	<p>3.1 Agree the purpose, format, and deadlines for texts prepared from audio recordings</p> <p>3.2 Input text from an audio recordings at a minimum speed of 60 words per minute</p> <p>3.3 Format texts to agreed format making best use of available technology</p> <p>3.4 Clarify text requirements when necessary</p> <p>3.5 Read and check texts for accuracy</p> <p>3.6 Edit and correct texts, as required</p> <p>3.7 Store texts and original recording safely and securely following organisational procedures</p> <p>3.8 Present texts to the required format, within the agreed deadlines</p>			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

## Unit 17: Support the Organisation of an Event

Unit code:	Q223
Unit reference number:	L/601/2505
QCF level:	2
Credit value:	2
Guided learning hours:	15

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### Unit summary

This unit is about supporting the organisation of an event.

#### Forbidden combination

This unit must not be taken with Unit 21: *Plan and Organise an Event* (R/601/2540).

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.10	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.



## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Understand the role and purpose of providing support with the organisation of an event</p>	<p>1.1 Describe the role and responsibilities required when supporting the organisation of an event</p> <p>1.2 Identify a range of support activities that may be required when supporting the organisation of an event</p> <p>1.3 Identify the purpose and value of giving assistance with organising an event</p> <p>1.4 Describe the different types of events and their main features</p> <p>1.5 Describe the types of risks associated with events and how to minimise these</p> <p>1.6 Outline the types of information that delegates will need</p> <p>1.7 Explain how to identify suitable venues for different types of events</p> <p>1.8 Describe the types of resources needed to prepare for different types of events</p> <p>1.9 Outline the different special requirements that delegates may have and how to meet these</p> <p>1.10 Describe the health, safety and security requirements that need to be considered when organising events</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Be able to support the organisation of an event</p>	<p>2.1 Contribute to the organisation of an event by:</p> <ul style="list-style-type: none"> <li>a) supporting the implementation of the plan for the event to meet agreed objectives</li> <li>b) identifying resources and support needed for organising an event</li> <li>c) identifying and costing suitable venues</li> <li>d) arranging resources and production of event materials</li> <li>e) preparing and sending of invitations to delegates</li> <li>f) co-ordinating delegate responses</li> <li>g) liaising with the venue to confirm event requirements</li> <li>h) providing delegates with joining instructions and event materials</li> <li>i) rehearsing arrangements to make sure the event runs smoothly, if required</li> <li>j) following all legal and contractual requirements</li> <li>k) following the relevant health, safety and security requirements for the event</li> </ul>			

Learner name: \_\_\_\_\_  
Learner signature: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_  
Internal verifier signature: \_\_\_\_\_  
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## Unit 18: Support the Co-ordination of an Event

Unit code:	Q224
Unit reference number:	D/601/2508
QCF level:	2
Credit value:	3
Guided learning hours:	20

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### Unit summary

This unit is about supporting the co-ordination and delivery of an event.

#### Forbidden combination

This unit must not be taken with Unit 22: *Co-ordinate an Event* (Y/601/2541).

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.5	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos</li><li>• evaluation reports.</li></ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the role and purpose of supporting the co-ordination of an event	<p>1.1 Describe the range of support activities that may be required when supporting the co-ordination of an event</p> <p>1.2 Identify the responsibilities involved in supporting the co-ordination of an event</p> <p>1.3 Describe the types of problems that may occur during events and how to deal with these</p> <p>1.4 Describe the points to observe when clearing and vacating an event</p> <p>1.5 Describe the types of follow-up activities that may be required to carry out the co-ordination of an event</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to support the co-ordination of an event	<p>2.1 Contribute to the co-ordination of an event by:</p> <ul style="list-style-type: none"> <li>a) preparing the venue and making sure all necessary resources and supporting activities are in place</li> <li>b) arranging resources during an event, in line with agreed plans</li> <li>c) helping delegates to feel welcome</li> <li>d) meeting delegates' needs throughout an event</li> <li>e) resolving or referring problems, as required</li> <li>f) liaising with the management of the venue to make sure facility resources are in place</li> <li>g) clearing, and vacating the venue according to the terms of the contract</li> <li>h) preparing and circulating papers, or completing other follow up actions following the event, if required</li> </ul>			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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



## Unit 19: Support the Organisation of Business Travel or Accommodation

Unit code:	Q225
Unit reference number:	Y/601/2510
QCF level:	2
Credit value:	3
Guided learning hours:	18

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### Unit summary

This unit is about supporting the delivery of business travel or accommodation arrangements following instruction from the organiser or traveller(s).

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.9	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1	
3	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos</li><li>• briefs</li><li>• budgets.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	3.2 – 3.5 3.7 – 3.9	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos.</li> </ul>
	3.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• records.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Understand the purpose of confirming a brief and budget for business travel or accommodation</p>	<p>1.1 Explain the purpose of obtaining and confirming instructions for arranging business travel or accommodation</p> <p>1.2 Explain the purpose and benefits of confirming the requirements of a brief and budget for business travel or accommodation arrangements</p> <p>1.3 Explain the purpose of following the requirements of a brief and budget for business travel or accommodation arrangements</p> <p>1.4 Describe how to support the organisation of business travel or accommodation to meet expectations</p> <p>1.5 Describe the main types of business travel or accommodation arrangements that may need to be made and the procedures to follow</p> <p>1.6 Describe how to obtain best value for money when making business travel or accommodation arrangements</p> <p>1.7 Describe how to keep records of business travel or accommodation arrangements</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Know the sources of information and facilities available to make business travel or accommodation arrangements	1.8 Outline the documents and information to provide to the person who is travelling and how to obtain these			
	1.9 Describe the types of problems that may occur with business travel or accommodation arrangements and the correct procedures to follow in order to deal with these problems			
	2.1 Describe sources of information, and the facilities available, for making business travel or accommodation arrangements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to support the organisation with business travel or accommodation arrangements</p>	<p>3.1 Confirm the brief and budget for business travel or accommodation arrangements</p> <p>3.2 Check a draft itinerary and schedule with organiser or traveller(s)</p> <p>3.3 Identify suitable business travel or accommodation options</p> <p>3.4 Book suitable business travel or accommodation arrangements, following instructions:</p> <p>a) to meet the brief and budget using available sources of information and facilities</p> <p>b) obtaining best value for money</p> <p>c) making payment or agreeing payment arrangements</p> <p>3.5 Obtain confirmations, and collate documents for business travel or accommodation arrangements</p> <p>3.6 Maintain records of business travel or accommodation arranged</p> <p>3.7 Provide the organiser or traveller(s) with an itinerary and required documents in good time</p> <p>3.8 Confirm with the organiser or traveller(s) that itinerary and documents meet requirements</p> <p>3.9 Resolve or refer problems to the appropriate person</p>			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(if sampled)

## Unit 20: Support the Organisation of Meetings

Unit code:	Q226
Unit reference number:	T/601/2515
QCF level:	2
Credit value:	4
Guided learning hours:	18

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### Unit summary

This unit is about supporting the planning and organisation of meetings.

#### Forbidden combination

This unit must not be taken with Unit 23: *Plan and Organise Meetings* (D/601/2542).

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.9	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 2.3 – 2.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos</li><li>• event documentation.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	2.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• budgets.</li> </ul>
	2.7 2.9	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.
	2.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• records.</li> </ul>
3	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.
	3.2 – 3.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.



## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Understand the arrangements to be made to support the planning and organising of meetings</p>	<p>1.1 Describe the role and responsibilities for supporting the organiser of the meeting</p> <p>1.2 Describe different types of meetings and their main features</p> <p>1.3 Describe how to help plan meetings to meet agreed aims and objectives</p> <p>1.4 Describe the types of resources that may be needed for different types of meetings</p> <p>1.5 Describe health, safety and security arrangements to follow when organising meetings</p> <p>1.6 Explain the purpose of following the agreed brief, plan and the resources required, when arranging a meeting</p> <p>1.7 Identify the sources and types of information and services needed to arrange a meeting</p> <p>1.8 Describe how to help the meeting organiser during the meeting</p> <p>1.9 Describe the organisational procedures for clearing and vacating a meeting room</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to prepare for a meeting	2.1 Confirm the purpose and venue of a meeting 2.2 Confirm a budget for a meeting, if required 2.3 Organise and confirm venue, equipment and catering requirement, if required 2.4 Invite attendees and confirm attendance 2.5 Collate and dispatch papers for a meeting within agreed timescales 2.6 Make sure attendees' needs are met 2.7 Make sure equipment and layout of the rooms meets the meeting brief 2.8 Keep records of arrangements made and services used 2.9 Attend to any requirements during the meeting as directed by the meeting organiser			
3 Be able to follow up a meeting	3.1 Follow organisation procedures for clearing a meeting room 3.2 Circulate a meeting record to agreed timescales 3.3 Make sure arrangements for payments have been met, if required 3.4 Contribute to the evaluation of arrangements made for meetings, as required			

Learner name: \_\_\_\_\_  
Learner signature: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_  
Internal verifier signature: \_\_\_\_\_  
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Date: \_\_\_\_\_  
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## Unit 21: Plan and Organise an Event

Unit code:	Q320
Unit reference number:	R/601/2540
QCF level:	3
Credit value:	4
Guided learning hours:	28

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### Unit summary

This unit is about planning and organising an event.

#### Forbidden combination

This unit must not be taken with Unit 17: *Support the Organisation of an Event* (D/601/2508).

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.6	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1	
3	3.1 – 3.3	
4	4.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos</li><li>• briefs</li><li>• budgets.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	4.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• plans.</li> </ul>
	4.3 – 4.16	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• event packs</li> <li>• training schedules.</li> </ul>

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the role of an event organiser in planning an event	<p>1.1 Explain the purpose and benefits of planning an event</p> <p>1.2 Explain the role of the event organiser in:</p> <p>a) meeting the objectives of the event</p> <p>b) agreeing a brief and budget for the event</p> <p>1.3 Identify and evaluate the types of risks associated with events and explain how to minimise these</p> <p>1.4 Explain the purpose and benefits of a contingency plan for an event</p> <p>1.5 Describe the types of problems that may occur when organising an event and how to solve them</p> <p>1.6 Categorise different types of events and their main features</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Understand the arrangements to be made when planning and organising an event</p>	<p>2.1 Explain the role of the event organiser for:</p> <ul style="list-style-type: none"> <li>a) anticipating and planning for all delegate provision and needs before and during the event, including investigating and providing for any special requirements</li> <li>b) meeting relevant health, safety and security arrangements</li> <li>c) meeting legal and organisational requirements for contracts</li> <li>d) organising resources and the production of event materials</li> <li>e) the types of activities and resources that may be needed during an event</li> <li>f) liaison with the venue and the supporting team to make sure all requirements are met and roles are understood</li> </ul>			
<p>3 Understand the different types of venues and resources needed for different types of events</p>	<p>3.1 Identify and evaluate different types of venue in terms of suitability for events and costs</p> <p>3.2 Describe a range of resources that may be needed for events and illustrate how they may be used</p> <p>3.3 Identify examples, and explain the purpose and benefits of selection criteria when choosing a venue and resources for an event</p>			



Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Be able to plan and organise an event</p>	<p>4.1 Agree an event brief and budget</p> <p>4.2 Agree a plan for an event, which will meet agreed objectives and address any identified risks and contingencies</p> <p>4.3 Identify and agree resources and support needed for organising an event</p> <p>4.4 Agree requirements for venue(s)</p> <p>4.5 Identify venue and agree costings</p> <p>4.6 Liaise with the venue to confirm event requirements and/or any special delegate requirements</p> <p>4.7 Agree requirements for resources</p> <p>4.8 Co-ordinate resources and production of event materials</p> <p>4.9 Make sure arrangements are in place for the event to meet relevant health, safety and security requirements</p> <p>4.10 Make sure legal and organisational requirements for contracts are met</p> <p>4.11 Make sure that all those involved are briefed and trained to fulfil their roles</p> <p>4.12 Delegate functions to the event team as required</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	4.13 Make arrangements for rehearsals to make sure the event runs smoothly, if required 4.14 Make sure invitations are sent out to delegates 4.15 Manage delegate responses 4.16 Prepare joining instructions and event materials to be sent to delegates			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

## Unit 22: Co-ordinate an Event

Unit code:	Q321
Unit reference number:	Y/601/2541
QCF level:	3
Credit value:	4
Guided learning hours:	30

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### Unit summary

This unit is about co-ordinating the delivery of an event.

#### Forbidden combination

This unit must not be taken with Unit 18: *Support the Co-ordination of an Event* (D/601/2508).

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.2	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.2	
3	3.1 – 3.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.
	3.8 – 3.10 3.12 – 3.13	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos</li><li>• event records.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	3.11	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• budget reconciliations.</li> </ul>

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the role of an event co-ordinator in managing an event to meet the objectives of the brief	1.1 Explain the responsibilities of an event co-ordinator 1.2 Describe the purpose of agreeing a plan that meets the objectives of the event brief			
2 Understand the activities required when co-ordinating an event	2.1 Explain the role of the event co-ordinator during the event for: a) all delegate provision and needs b) meeting relevant health, safety and security requirements c) observing legal and organisational requirements for contracts d) co-ordinating resources and the use of event materials e) liaising with the venue and supporting team during an event to make sure all requirements are met and roles are carried out f) resolving problems g) overseeing the work of key staff			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>2.2 Explain the role of an event co-ordinator after an event for:</p> <ul style="list-style-type: none"> <li>a) clearing and vacating the venue</li> <li>b) organising follow up papers and activities, if required</li> <li>c) reconciling accounts to budget</li> <li>d) evaluating an event and the methods that can be used to do this</li> </ul>			
<p>3 Be able to co-ordinate an event</p>	<p>3.1 Prepare the venue and make sure all necessary resources are in place</p> <p>3.2 Co-ordinate activities during an event, in line with agreed plans</p> <p>3.3 Help delegates to feel welcome</p> <p>3.4 Respond to delegates' needs throughout an event</p> <p>3.5 Resolve problems, as required</p> <p>3.6 Oversee the work of key staff during the event</p> <p>3.7 Monitor compliance with relevant health, safety and security requirements</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>3.8 Liaise with the management of the venue to make sure facility resources are in place</p> <p>3.9 Arrange clearing and vacating the venue according to the terms of the contract</p> <p>3.10 Prepare and circulate papers, or complete other follow-up actions following the event, if required</p> <p>3.11 Reconcile accounts to budget, if required</p> <p>3.12 Evaluate an event identifying recommendations and passing these on to relevant colleagues, where relevant</p> <p>3.13 Agree key learning points and use these to improve the running of future events</p>			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

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*(if sampled)*





## Unit 23: Plan and Organise Meetings

Unit code:	Q322
Unit reference number:	D/601/2542
QCF level:	3
Credit value:	5
Guided learning hours:	25

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### Unit summary

This unit is about planning and organising meetings to meet the agreed purpose of the meeting.

#### Forbidden combination

This unit must not be taken with unit 20: *Support the Organisation of Meetings* (T/601/2515).

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.17	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 2.4 – 2.6 2.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	2.2	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• budget.</li> </ul>
	2.3	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• agenda</li> <li>• meeting papers.</li> </ul>
	2.7	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.</p>
3	3.1	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.</p>
	3.2 – 3.4	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:</p> <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• meeting papers.</li> </ul>

Learning outcomes	Assessment criteria	Assessment guidance
4	4.1 – 4.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• records.</li> </ul>
	4.3 – 4.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos.</li> </ul>
	4.5 – 4.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• evaluations.</li> </ul>

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Understand the arrangements and actions required for planning and organising meetings</p>	<p>1.1 Explain the role of the person planning and organising a meeting</p> <p>1.2 Describe the different types of meetings and their main features</p> <p>1.3 Explain how to plan meetings that meet agreed aims and objectives</p> <p>1.4 Explain the purpose of agreeing a brief for the meeting</p> <p>1.5 Explain how to identify suitable venues for different types of meetings</p> <p>1.6 Describe the types of resources needed for different types of meetings</p> <p>1.7. Outline the main points that should be covered by an agenda and meeting papers</p> <p>1.8 Explain the purpose of meeting attendees' needs and special requirements, and providing them with information required for meetings</p> <p>1.9 Describe the health, safety and security requirements that need to be considered when organising meetings</p> <p>1.10 Explain the purpose and benefits of briefing the chair before a meeting</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>1.11 Explain the purpose of welcoming and providing suitable refreshments to attendees, if required</p> <p>1.12 Describe the types of information, advice and support that may need to be provided during a meeting</p> <p>1.13 Describe the types of problems that may occur during a meeting and how to solve them</p> <p>1.14 Explain what should be included in a record of a meeting, and the purpose of ensuring the record is accurate and approved</p> <p>1.15 Explain how to record actions and follow up, if required</p> <p>1.16 Explain the purpose of collecting and evaluating participant feedback from the meeting</p> <p>1.17 Describe how to agree learning points to improve the organisation of future meetings</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to prepare for a meeting	2.1 Agree and prepare the meeting brief, checking with others, if required 2.2 Agree a budget for the meeting, if required 2.3 Prepare and agree an agenda and meeting papers 2.4 Organise and confirm venue, equipment and catering requirements, when necessary 2.5 Invite attendees, confirm attendance and identify any special requirements 2.6 Arrange catering, if required 2.7 Arrange the equipment and layout of the room, if required 2.8 Make sure the chair receives appropriate briefing			
3 Be able to support running a meeting	3.1 Welcome attendees and offer suitable refreshments (if required) 3.2 Make sure attendees have full set of papers 3.3 Make sure a person has been nominated to take minutes, if required 3.4 Provide information, advice and support when required			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 How to follow up a meeting	4.1 Produce a record of the meeting 4.2 Seek approval for the meeting record, amend as required 4.3 Respond to requests for amendments and arrange recirculation of a revised meeting record 4.4 Follow up action points, if required 4.5 Evaluate meeting arrangements, and external services where used 4.6 Evaluate participant feedback from the meeting and share results with relevant people, where used 4.7 Summarise learning points and use these to identify improvements that can be made to future meeting arrangements and support			

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*(if sampled)*





## Unit 24: **Make and Receive Telephone Calls**

Unit code:	Q107
Unit reference number:	K/601/2446
QCF level:	1
Credit value:	3
Guided learning hours:	10

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### Unit summary

This unit is about making and receiving telephone calls, and transferring calls when necessary, in a business environment.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.10	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.9	
3	3.1 – 3.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• telephone logs.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	3.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, case studies, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• memos</li> <li>• emails</li> <li>• telephone logs.</li> </ul>
4	4.1 – 4.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• telephone logs</li> <li>• messages.</li> </ul>
	4.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, case studies, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• memos</li> <li>• emails</li> <li>• telephone logs.</li> </ul>

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand how to make telephone calls	<p>1.1 Describe the different features of telephone systems and how to use them</p> <p>1.2 Give reasons for identifying the purpose of a call before making it</p> <p>1.3 Describe different ways of obtaining the names and numbers of people that need to be contacted</p> <p>1.4 Describe how to use a telephone system to make contact with people inside and outside an organisation</p> <p>1.5 Explain the purpose of giving a positive image of self and own organisation</p> <p>1.6 Explain the purpose of summarising the outcomes of a telephone conversation before ending the call</p> <p>1.7 Describe how to identify problems and who to refer them to</p> <p>1.8 Describe organisation structures and communication channels within an organisation</p> <p>1.9 Describe how to follow organisational procedures when making a telephone call</p> <p>1.10 Explain how to report telephone system faults</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Understand how to receive and transfer telephone calls</p>	<p>2.1 Describe how to identify callers and their needs</p> <p>2.2 Explain the purpose of giving accurate and up to date information to callers</p> <p>2.3 Explain the purpose of confidentiality and security when dealing with callers</p> <p>2.4 Describe the types of information that could affect confidentiality and security and how to handle these</p> <p>2.5 Describe ways of identifying the appropriate person to whom a call is transferred</p> <p>2.6 Describe the information to be given when transferring calls or leaving messages</p> <p>2.7 Describe how to identify problems and who to refer them to</p> <p>2.8 Describe how to follow organisational procedures when receiving a telephone call</p> <p>2.9 Explain how to report telephone system faults</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to make telephone calls</p>	<p>3.1 Identify the purpose of the call</p> <p>3.2 Obtain the name and number of the person to be contacted</p> <p>3.3 Make contact with the person</p> <p>3.4 Communicate information to achieve the purpose of the call</p> <p>3.5 Project a positive image of self and organisation</p> <p>3.6 Summarise the outcomes of the conversation before ending a call</p> <p>3.7 Report telephone system faults, if necessary</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Be able to receive telephone calls	4.1 Answer a phone following organisational procedures 4.2 Give a positive image of self and organisation 4.3 Identify the caller, where they are calling from, and what they need 4.4 Give accurate and up to date information whilst protecting confidentiality and security 4.5 Transfer calls, if required 4.6 Take and pass on messages according to the caller's needs 4.7 Summarise the outcomes of the conversation before ending the call 4.8 Report telephone system faults, if necessary			

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

## Unit 25: Use Electronic Message Systems

Unit code:	Q207
Unit reference number:	H/601/2476
QCF level:	2
Credit value:	1
Guided learning hours:	6

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### Unit summary

This unit is about organising and updating messages using an electronic message system.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.5	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.
	2.5 – 2.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• messages.</li></ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.



## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the use of electronic message systems	1.1 Describe the main types of electronic message systems 1.2 Describe the different features of electronic message systems 1.3 Explain the purpose of keeping an electronic message system up to date 1.4 Describe how to use an electronic message system to check and delete or discard messages 1.5 Explain the purpose of leaving clear messages for others			
2 Be able to use electronic message system	2.1 Keep a message system up to date 2.2 Check system for messages 2.3 Respond to messages within agreed timescales 2.4 Delete messages when dealt with 2.5 Select the information to be given when taking or leaving messages 2.6 Leave messages on other people's systems, if required			

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## Unit 26: Use Diary Systems

Unit code:	Q208
Unit reference number:	K/601/2477
QCF level:	2
Credit value:	3
Guided learning hours:	9

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### Unit summary

This unit is about using a diary system to organise and record work activities so that planned work can take place.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.3	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.8	
3	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	3.2 3.4 - 3.7	Evidence may be supplied via observation of workplace activities, witness testimony and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• diary</li> <li>• letters</li> <li>• emails</li> <li>• memos.</li> </ul>
	3.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• diary.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q203, Q204, Q205.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand a diary system	<p>1.1 Explain the purpose of using a diary system</p> <p>1.2 Describe different types of diary systems</p> <p>1.3 Describe the purpose of obtaining relevant information about requested diary entries and changes</p>			
2 Understand how to use a diary system	<p>2.1 Describe the types of information needed for diary entries</p> <p>2.2 Explain how to prioritise requests</p> <p>2.3 Explain the purpose of prioritising requests</p> <p>2.4 Explain the purpose of trying to balance the needs of all those involved</p> <p>2.5 Explain the purpose of communicating changes to those affected</p> <p>2.6 Explain the purpose of keeping a diary system up to date</p> <p>2.7 Describe the different types of problems that may occur when new requests are made and solutions to these problems</p> <p>2.8 Explain the purpose of following security and confidentiality procedures when using a diary system</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to use a diary system	3.1 Obtain information needed to make diary entries 3.2 Make diary entries accurately and clearly 3.3 Prioritise changes to entries, as required 3.4 Record agreed changes in the diary 3.5 Identify and report the effects of any changes for existing entries 3.6 Solve problems by negotiating alternative arrangements, when necessary 3.7 Keep a diary up to date and store it securely			

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*(if sampled)*

## Unit 27: Take Minutes

Unit code:	Q209
Unit reference number:	M/601/2478
QCF level:	2
Credit value:	4
Guided learning hours:	15

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### Unit summary

This unit is about taking minutes at different kinds of meetings, where an accurate record is needed of decisions made and actions agreed.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.4	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.2	
3	3.1 – 3.9	
4	4.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>
	4.2	

Learning outcomes	Assessment criteria	Assessment guidance
	4.3	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• agenda.</li> </ul>
5	5.1 – 5.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• notes of meeting</li> <li>• minutes of meeting.</li> </ul>
	5.4 – 5.7	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• minutes of meetings.</li> </ul>
	5.8 5.10	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• minutes.</li> </ul>
	5.9	Evidence may be supplied via witness testimony and learner reports/reflective accounts.

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q203, Q204, Q205.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.



## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the task of taking minutes at meetings	<p>1.1 Describe the purpose of meetings</p> <p>1.2 Describe legal and organisational requirements that may apply to minute taking</p> <p>1.3 Explain the purpose of minutes as an accurate record of discussions and decisions</p> <p>1.4 Describe the purpose of documents and terms that are commonly used in meetings</p>			
2 Understand the role of the chair and other formal responsibilities in meetings	<p>2.1 Explain the role of the chair and other formal responsibilities within meetings</p> <p>2.2 Describe how to work in partnership with the chair when taking minutes</p>			
3 Know how to take minutes at meetings	<p>3.1 Explain the purpose of listening actively when taking minutes</p> <p>3.2 Explain how to listen actively when minute taking</p> <p>3.3 Describe how to take notes during discussions held at meetings</p> <p>3.4 Explain the purpose of getting clarification</p> <p>3.5 Describe how to get clarification</p> <p>3.6 Describe different types of minutes and their purpose</p> <p>3.7 Describe the different styles of writing that may be used in minute taking</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	3.8 Explain how to sort, select and structure information to produce minutes 3.9 Explain what is meant by using the correct tone and professional language in minutes			
4	Be able to prepare for taking minutes 4.1 Prepare for taking minutes, as required 4.2 Communicate with the meeting chair, as required 4.3 Note any changes to the agenda, matters arising and action points from last meeting			
5	Be able to minute meetings 5.1 Take notes at a meeting of all items required 5.2 Produce accurate minutes that record the meaning of discussions and decisions taken 5.3 Make sure minutes are in the agreed style 5.4 Make sure the process for signing off minutes and / or action points has been agreed 5.5 Check minutes and make necessary amendments 5.6 Agree minutes with the relevant people and circulate them within the agreed timescales 5.7 Follow organisational requirements for confidentiality and security of information, as required			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	5.8 Make sure follow-up actions, and who is responsible for taking the actions, have been clearly identified 5.9 Store notes and minutes following organisational procedures 5.10 Follow legal and organisational requirements for minute taking, as necessary			

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*(if sampled)*



## Unit 28: Develop a Presentation

Unit code:	Q310
Unit reference number:	M/601/2528
QCF level:	3
Credit value:	3
Guided learning hours:	15

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### Unit summary

This unit is about developing a presentation.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.5	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>
	2.2	Evidence may be supplied via learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• plans.</li></ul>
	2.3 – 2.4 2.8 – 2.9	Evidence may be supplied via learner reports/reflective accounts.

Learning outcomes	Assessment criteria	Assessment guidance
	2.5 2.7	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• feedback received.</li> </ul>
	2.6	Evidence may be supplied via learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• handouts.</li> </ul>

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the purpose of preparing for and evaluating a presentation	<p>1.1 Explain the purpose of using different types of presentation and equipment to provide information</p> <p>1.2 Explain the procedures to be followed when preparing a presentation, including planning, preparation of content, materials, and contingencies</p> <p>1.3 Explain the benefits of preparing for giving a presentation</p> <p>1.4 Explain and illustrate how presentations may be enhanced by materials and equipment</p> <p>1.5. Explain the purpose and benefits of reflecting on the feedback obtained on the written presentation</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to develop a presentation	2.1 Agree and confirm audience, purpose, content, style and timing of a presentation 2.2 Research and plan a presentation 2.3 Select any equipment needed for the presentation 2.4 Prepare content, shape and structure of a presentation to achieve its purpose and suit needs of audience 2.5 Obtain feedback on planned presentation and make adjustments, if required 2.6 Produce presentation handouts 2.7 Collect feedback on the written presentation 2.8 Reflect on the feedback obtained of the written presentation and identify learning points 2.9 Identify changes that will improve future written presentations			

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*(if sampled)*



## Unit 29: Deliver a Presentation

Unit code:	Q311
Unit reference number:	T/601/2529
QCF level:	3
Credit value:	3
Guided learning hours:	15

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### Unit summary

This unit covers the skills, knowledge and understanding learners need to prepare for, deliver and evaluate a presentation for an audience.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.8	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.5	
3	3.1 – 3.3	
	3.4	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>

<b>Learning outcomes</b>	<b>Assessment criteria</b>	<b>Assessment guidance</b>
4	4.1	Evidence may be supplied via learner reports/reflective accounts.
	4.2	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• presentation materials.</li> </ul>
	4.3 – 4.11	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• presentation notes</li> <li>• handouts</li> <li>• slides.</li> </ul>
5	5.1	Evidence may be supplied via learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• feedback</li> <li>• evaluation sheets.</li> </ul>
	5.2 – 5.3	Evidence may be supplied via learner reports/reflective accounts.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Understand the purpose of preparing for and evaluating a presentation</p>	<p>1.1 Explain the purpose of using different types of presentation and equipment</p> <p>1.2 Explain different ways of delivering presentations and their features</p> <p>1.3 Explain the procedures to be followed when preparing a presentation</p> <p>1.4 Explain the benefits of preparing for giving a presentation</p> <p>1.5 Describe the types of problems that may occur with equipment and how to deal with them</p> <p>1.6 Explain the purpose and benefits of contingency planning</p> <p>1.7 Explain the purpose and benefits of collecting feedback from the audience on the presentation</p> <p>1.8 Explain the purpose and benefits of evaluating presentations and own performance</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand the techniques used in enhancing a presentation	2.1 Explain and illustrate how presentations may be enhanced by materials and equipment 2.2 Explain and illustrate how presentations may be enhanced by use of communication and interpersonal skills 2.3 Describe how to gauge audience reaction to the presentation 2.4 Explain the purpose and benefits of summarising important features of the presentation 2.5 Describe the purpose and benefits of giving the audience opportunities to ask questions			
3 Be able to prepare for delivery of a presentation	3.1 Select any equipment needed and plan how to use it to best effect 3.2 Make contingency plans in case of equipment failure or other problems, if required 3.3 Practise the presentation and its timing 3.4 Obtain feedback on planned presentation and make adjustments, if required			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Be able to deliver a presentation</p>	<p>4.1 Check equipment and resources</p> <p>4.2 Circulate presentation materials</p> <p>4.3 Introduce self to audience and state aims of the presentation</p> <p>4.4 Address the audience, speaking clearly and confidently, using language to suit the topic and audience</p> <p>4.5 Vary tone, pace and volume to emphasise key points</p> <p>4.6 Gauge audience reaction during the presentation and adapt if required</p> <p>4.7 Summarise throughout the presentation to emphasise key points and help to maintain audience interest</p> <p>4.8 Use body language in a way that reinforces presented information</p> <p>4.9 Use equipment, where appropriate, to enhance the presentation, and deal with any problems that may occur</p> <p>4.10 Provide the audience with opportunities to ask questions</p> <p>4.11 Listen carefully to questions and respond in a way that meets the audience's needs</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to evaluate a presentation	5.1 Collect feedback on the presentation 5.2 Reflect on own performance and identify learning points 5.3 Evaluate the presentation and own performance and identify changes that will improve future presentations			

Learner name: \_\_\_\_\_

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

Learner signature: \_\_\_\_\_

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

Assessor signature: \_\_\_\_\_

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

Internal verifier signature: \_\_\_\_\_

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

(if sampled)

## Unit 30: Handle Mail

Unit code:	Q210
Unit reference number:	T/601/2479
QCF level:	2
Credit value:	3
Guided learning hours:	17

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### Unit summary

This unit is about handling internal and external mail and packages within the service requirements of an organisation.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.2	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.6	
3	3.1 – 3.3 3.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• mail records</li><li>• log book – special deliveries.</li></ul>
	3.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.

Learning outcomes	Assessment criteria	Assessment guidance
4	4.1 – 4.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• mail records</li> <li>• log book – special deliveries.</li> </ul>
5	5.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role.
	5.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• mail records</li> <li>• log book – special deliveries.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.



## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand security procedures when handling mail or packages			
	<p>1.1 Explain the purpose of security procedures for handling mail or packages</p> <p>1.2 Give examples of security procedures for handling mail in organisation(s)</p>			
2	Understand the range of available internal and external mail services			
	<p>2.1 Explain the purpose of distributing and dispatching mail to the correct recipient within agreed timescales</p> <p>2.2 State the organisational structure and names, roles and locations of individuals and teams</p> <p>2.3 Give examples of internal and external mail services available to organisations</p> <p>2.4 Give reasons for selecting internal and external mail services</p> <p>2.5 Describe the methods of calculating postage charges for mail or packages</p> <p>2.6 Describe the types of problems that may occur with incoming and outgoing mail and how to deal with these</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to receive, distribute and collect internal mail or packages	3.1 Receive, check and sort incoming mail or packages 3.2 Identify and deal with unwanted junk mail or damaged items 3.3 Identify and deal with suspicious items 3.4 Distribute incoming mail or packages 3.5 Collect, sort and prioritise outgoing mail or packages			
4 Be able to follow procedures for despatching mail or packages	4.1 Identify best options for despatching mail 4.2 Agree a cost for despatching mail or packages 4.3 Arrange services to collect outgoing mail or packages, if required 4.4 Identify and prepare items for urgent or special delivery, where necessary 4.5 Calculate correct postage charges for outgoing mail or packages 4.6 Record postage costs 4.7 Despatch outgoing mail or packages to agreed timescale			
5 Be able to resolve, report or refer problems that may occur in handling mail or packages	5.1 Identify where a problem may exist with incoming and outgoing mail or packages 5.2 Resolve, report or refer problems with incoming and outgoing mail or packages			

Learner name: \_\_\_\_\_  
Learner signature: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_  
Internal verifier signature: \_\_\_\_\_  
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## Unit 31: Provide Reception Services

Unit code:	Q211
Unit reference number:	K/601/2480
QCF level:	2
Credit value:	3
Guided learning hours:	15

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### Unit summary

This unit is about providing a reception service in a business environment, acting as the first point of contact between a business, its clients and the public.

### Forbidden combination

This unit must not be taken with Unit 32: *Meet and Welcome Visitors* (Y/601/2457).

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.3	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.9	
3	3.1 – 3.2	
4	4.1 – 4.5 4.7 4.9 – 4.10	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.

Learning outcomes	Assessment criteria	Assessment guidance
	4.6 4.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205, Q256.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1. Understand the purpose of reception services in a business environment	<p>1.1 Explain the purpose of the receptionist role as the first point of contact between the public/client and an organisation</p> <p>1.2 Explain the purpose of presenting a positive image of self and the organisation</p> <p>1.3 Explain how to present a positive image of self and the organisation</p>			
2. Understand the procedures to be followed when providing reception services	<p>2.1 Describe the structure and lines of communication in an organisation</p> <p>2.2 Explain how the structure in an organisation affects lines of communication</p> <p>2.3 Explain the purpose of entry, departure, security and confidentiality procedures, including own responsibilities</p> <p>2.4 Explain how to carry out entry, departure, security and confidentiality procedures in a reception area</p> <p>2.5 Explain the purpose of health and safety procedures when providing a reception service, including own responsibilities</p> <p>2.6 Explain how to carry out health and safety procedures in a reception area</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>2.7 Describe the emergency procedures and your role within them</p> <p>2.8 Describe the types of problems that may occur with visitors including conflict and aggression</p> <p>2.9 Explain ways of dealing with problems and when to refer them to an appropriate colleague</p>			
<p>3. Understand ways of improving reception services and developing own role</p>	<p>3.1 Explain the purpose of suggesting ideas for improving a reception area</p> <p>3.2 Explain the purpose of carrying out additional duties, if applicable, and give examples</p>			
<p>4. Provide a reception service</p>	<p>4.1 Present a positive image of self and the organisation</p> <p>4.2 Provide individuals with requested information and other useful information, within guidelines on confidentiality</p> <p>4.3 Follow entry and exit security procedures, if required</p> <p>4.4 Follow relevant health and safety procedures</p> <p>4.5 Deal with problems that may occur, if necessary</p> <p>4.6 Refer problems, as required</p> <p>4.7 Make sure a reception area gives a positive image of the organisation</p>			



Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	4.8 Make suggestions for improving a reception area, as required 4.9 Follow organisational procedures in the event of an accident or emergency, as required 4.10 Look for and complete additional task(s) during quiet periods, as required			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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*(if sampled)*



## Unit 32: Meet and Welcome Visitors

Unit code:	Q256
Unit reference number:	Y/601/2457
QCF level:	2
Credit value:	3
Guided learning hours:	23

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### Unit summary

This unit covers the procedures to follow and hospitality to offer when meeting and welcoming visitors to business premises.

#### Forbidden combination

This unit must not be taken with Unit 31: *Provide Reception Services* (K/601/2480).

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.8	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.2 2.4 – 2.8	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.
	2.3 2.9	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>visitors' book.</li></ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205, Q211.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Understand procedures for meeting and welcoming visitors</p>	<p>1.1 Describe different reasons for people visiting a business, their requirements and how their needs may be met</p> <p>1.2 Explain the purpose of dealing with visitors promptly and courteously</p> <p>1.3 Explain the purpose of presenting a positive image of self and the organisation</p> <p>1.4 Explain the purpose of following health, safety and security procedures when dealing with visitors, including own responsibilities</p> <p>1.5 Describe different types of problems that may occur with visitors including conflict and aggression</p> <p>1.6 Describe ways of dealing with different problems and when to refer them to an appropriate colleague</p> <p>1.7 Explain the purpose of communicating with visitors</p> <p>1.8 Describe organisation structures and communication channels within the organisation</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to meet and welcome visitors	2.1 Greet visitor(s) and make them feel welcome 2.2 Identify visitors and the reason for their visit 2.3 Use the organisation's systems to receive and record visitors, as appropriate 2.4 Make sure visitors' needs are met 2.5 Present positive image of self and the organisation 2.6 Follow health, safety and security procedures, as required 2.7 Inform others of visitors' arrival, as required, in line with appropriate communication channels 2.8 Deal with any problems that may occur, or refer problems to the appropriate person 2.9 Follow procedures for departing visitors, as required			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

## Unit 33: Deliver, Monitor and Evaluate Customer Service to Internal Customers

Unit code:	Q328
Unit reference number:	A/601/2550
QCF level:	3
Credit value:	3
Guided learning hours:	12

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### Unit summary

This unit is about providing and continuously improving services to internal customers.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1	
3	3.1 – 3.4	
4	4.1 – 4.3	
5	5.1 – 5.3	
6	6.1 – 6.3	
7	7.1	Evidence may be supplied via observation of workplace activities, witness testimony and learner reports/reflective accounts.

Learning outcomes	Assessment criteria	Assessment guidance
	7.2 – 7.4	Evidence may be supplied via observation of workplace activities witness testimony, professional discussion,
8	8.1 – 8.3	learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos.</li> </ul>
9	9.1	Evidence may be supplied via witness testimony, professional discussion, case studies and learner reports/reflective accounts.
10	10.1 – 10.3	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• feedback received.</li> </ul>

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.



## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the meaning of internal customer	1.1 Describe what is meant by internal customers			
2 Know the types of products and services relevant to internal customers	2.1 Describe the products and services offered by own organisation to internal customers			
3 Understand how to deliver customer service that meets or exceeds internal customer expectations	3.1 Explain the purpose and value of identifying internal customer needs and expectations			
	3.2 Explain why customer service must meet or exceed internal customer expectations			
	3.3 Explain the value of meeting or exceeding internal customer expectations			
	3.4 Explain the purpose and value of building positive working relationships			
4 Understand the purpose of quality standards and timescales for delivering customer service	4.1 Identify quality standards for own organisation and work			
	4.2 Explain the value of agreeing quality standards and timescales			
	4.3 Explain how to set and meet quality standards and timescales with internal customers			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Understand how to deal with internal customer service problems	5.1 Describe the types of problems that internal customers may have 5.2 Explain ways of dealing with problems 5.3 Explain the purpose and value of a complaints procedure, if applicable			
6 Understand how to monitor and evaluate internal customer service and the benefits of this	6.1 Explain the purpose and benefits of monitoring internal customer satisfaction and how to do so 6.2 Describe techniques for collecting and evaluating customer feedback 6.3 Explain the benefits of continuous improvement			
7 Be able to build positive working relationships with internal customers	7.1 Identify internal customers 7.2 Confirm internal customer needs in terms of products and services 7.3 Confirm internal customer needs in terms of quality standards and timescales 7.4 Agree procedures to be followed if internal customer needs are not met			
8 Be able to deliver customer services to agreed quality standards and timescales	8.1 Provide customer service(s) to agreed quality standards 8.2 Provide customer service(s) to agreed timescales 8.3 Check internal customer needs and expectations have been met			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
9 Be able to deal with internal customer service problems and complaints	9.1 Follow procedures, within agreed timescale, to a) process problems and complaints b) resolve problems and complaints c) refer problems and complaints, where necessary			
10 Be able to monitor and evaluate customer services to internal customers	10.1 Obtain and record internal customer feedback 10.2 Analyse and evaluate internal customer feedback 10.3 Take action that will lead to improvement in customer service(s) to internal customers			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
*(if sampled)*



## Unit 34: Deliver, Monitor and Evaluate Customer Service to External Customers

Unit code:	Q329
Unit reference number:	F/601/2551
QCF level:	3
Credit value:	3
Guided learning hours:	12

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### Unit summary

This unit is about providing and continuously improving customer services to external customers.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1	
3	3.1 – 3.4	
4	4.1 – 4.3	
5	5.1 – 5.4	
6	6.1 – 6.3	
7	7.1	Evidence may be supplied via observation of workplace activities, witness testimony and learner reports/reflective accounts.

Learning outcomes	Assessment criteria	Assessment guidance
	7.2 – 7.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources:
8	8.1 – 8.3	<ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos.</li> </ul>
9	9.1	Evidence may be supplied via witness testimony, professional discussion, case studies and learner reports/reflective accounts.
10	10.1 – 10.3	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• feedback received.</li> </ul>

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the meaning of external customers	1.1 Describe what is meant by external customers			
2 Know the types of products and services relevant to external customers	2.1 Describe the products and services offered by the organisation to external customers			
3 Understand how to deliver customer service that meets or exceeds external customer expectations	3.1 Explain the purpose and value of identifying customer needs and expectations			
	3.2 Explain why customer service must meet or exceed customer expectations			
	3.3 Explain the value of meeting or exceeding customer expectations			
	3.4 Explain the purpose and value of building positive working relationships			
4 Understand the purpose of quality standards and timescales for customer service to external customers	4.1 Identify quality standards for own organisation and work			
	4.2 Explain the value of agreeing quality standards and timescales			
	4.3 Explain how to set and meet quality standards and timescales with external customers			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Understand how to deal with customer service problems for external customers	5.1 Describe the types of problems that external customers may have 5.2 Explain the consequences of not meeting external customer needs and expectations 5.3 Explain ways of dealing with external customer service problems 5.4 Explain the purpose and value of a complaints procedure			
6 Understand how to monitor and evaluate external customer service and the benefits of this	6.1 Explain the purpose and benefits of monitoring external customer satisfaction and how to do so 6.2 Describe techniques for collecting and evaluating external customer feedback 6.3 Explain the benefits of continuous improvement			
7 Be able to build positive working relationships with external customers	7.1 Identify external customers 7.2 Confirm external customer needs in terms of products and services 7.3 Confirm external customer needs in terms of quality standards and timescales 7.4 Agree procedures to be followed if external customer needs are not met			



Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
8	Be able to deliver external customer services to agreed quality standards and timescales	8.1 Provide external customer service(s) to agreed quality standards 8.2 Provide external customer service(s) to agreed timescales 8.3 Check external customer needs and expectations have been met		
9	Be able to deal with customer service problems and complaints for external customers	9.1 Follow procedures, within agreed timescale, to a) process problems and complaints b) resolve problems and complaints c) refer problems and complaints, where necessary		
10	Be able to monitor and evaluate services to external customers	10.1 Obtain and record external customer feedback 10.2 Analyse and evaluate external customer feedback 10.3 Take actions that will lead to improvement in service(s) to external customers		

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
*(if sampled)*



## Unit 35: Organise and Report Data

Unit code:	Q217
Unit reference number:	R/601/2487
QCF level:	2
Credit value:	3
Guided learning hours:	12

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### Unit summary

This unit is about organising and reporting data to the agreed format and timescales.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.3	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.
	2.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• feedback obtained.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
3	3.1 – 3.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• examples of data.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand how to organise and report data that has been researched	1.1 Describe different ways of organising data that has been researched 1.2 Describe different ways of reporting data 1.3 Describe the purpose of presenting data to the agreed format and timescale			
2 Be able to organise data	2.1 Organise data so that it can be reported 2.2 Check the accuracy of the data, and make adjustments, if required 2.3 Obtain feedback on data collected, if required			
3 Be able to report data	3.1 Present data in agreed format 3.2 Present data to agreed timescale			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 (*if sampled*)



## Unit 36: Research Information

Unit code:	Q218
Unit reference number:	Y/601/2488
QCF level:	2
Credit value:	4
Guided learning hours:	17

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### Unit summary

This unit is about organising suitable data that has been researched using different sources of information.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.3	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 2.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos</li><li>• notes of informal meetings.</li></ul>
	2.2 – 2.3 2.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.

Learning outcomes	Assessment criteria	Assessment guidance
	2.5 – 2.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• records.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205, Q217.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.



## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand procedures for researching information			
	<p>1.1 Give reasons for agreeing objectives and deadlines for researching information</p> <p>1.2 Give reasons for identifying and agreeing sources of information</p> <p>1.3 Explain the purpose of recording and storing information researched</p>			
2	Be able to research information for others			
	<p>2.1 Agree aims, objectives and deadlines for the information search</p> <p>2.2 Identify sources of information</p> <p>2.3 Search for and obtain data</p> <p>2.4 Check that data is suitable for the purpose of the research</p> <p>2.5 Record the data and store it securely</p> <p>2.6 Make a record of information sources used</p> <p>2.7 Meet deadlines for completing research</p>			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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(if sampled)



## Unit 37: Store and Retrieve Information

Unit code:	Q219
Unit reference number:	R/601/2490
QCF level:	2
Credit value:	3
Guided learning hours:	17

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### Unit summary

This unit is about storing and retrieving information securely and within confidentiality requirements of the organisation.

### Assessment guidance

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.9	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 2.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos</li><li>• information.</li></ul>
	2.2 – 2.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.

Learning outcomes	Assessment criteria	Assessment guidance
3	3.1 3.3 – 3.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• information.</li> </ul>
	3.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205, Q220.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Understand processes and procedures for storing and retrieving information</p>	<p>1.1 Explain the purpose of storing and retrieving required information</p> <p>1.2 Describe different information systems and their main features</p> <p>1.3 Explain the purpose of legal and organisational requirements for the security and confidentiality of information</p> <p>1.4 Explain the purpose of confirming information to be stored and retrieved</p> <p>1.5 Describe ways of checking information for accuracy</p> <p>1.6 Explain the purpose of checking information for accuracy</p> <p>1.7 Explain the purpose of providing information to agreed format and timescales</p> <p>1.8 Describe the types of information that may be deleted</p> <p>1.9 Describe problems that may occur with information systems and how to deal with them, when necessary</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Be able to store information	2.1 Identify, confirm and collect information to be stored 2.2 Follow legal and organisational procedures for security and confidentiality of information to be stored 2.3 Store information in approved locations 2.4 Check and update stored information, if required 2.5 Delete stored information, if required 2.6 Deal with or refer problems, if required			
3 Be able to retrieve information	3.1 Confirm and identify information to be retrieved 3.2 Follow legal and organisational procedures for security and confidentiality of information 3.3 Locate and retrieve the required information 3.4 Check and update information, if required 3.5 Provide information in the agreed format and timescale 3.6 Deal with or refer problems if required			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_

Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

## Unit 38: Archive Information

Unit code:	Q220
Unit reference number:	Y/601/2491
QCF level:	2
Credit value:	2
Guided learning hours:	13

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### Unit summary

This unit is about deciding and agreeing the information to be archived and deleted within a business environment, including working with external archive systems if this function is outsourced from an organisation.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.10	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.2 2.4 2.6 – 2.9	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos</li><li>• information.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	2.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.
	2.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• records.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205, Q219.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.



## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Understand procedures for archiving information</p>	<p>1.1 Explain why and when required information should be archived</p> <p>1.2 Explain the purpose of agreeing retention periods for archiving information</p> <p>1.3 Describe procedures to be followed for archiving information, including legal requirements, if required</p> <p>1.4 Explain the purpose of organisational and legal requirements for the security and confidentiality of archived information</p> <p>1.5 Explain the purpose of deciding and agreeing information to be archived</p> <p>1.6 Describe procedures for recording and keeping archived information</p> <p>1.7 Explain how to retrieve archived information</p> <p>1.8 Describe how to delete information from an archive system</p> <p>1.9 Describe problems that may occur with systems containing archived information and how to deal with them or refer them</p> <p>1.10 Describe the purpose of conforming to requirements of an external archive system, if outsourced from the organisation</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Be able to archive information</p>	<p>2.1 Decide and agree the information to be archived, retrieved and deleted</p> <p>2.2 Decide and agree on the retention period for information being archived</p> <p>2.3 Follow legal and organisational policies and procedures for security and confidentiality of information</p> <p>2.4 Archive information to the agreed brief and timescale</p> <p>2.5 Maintain and update a record of information archived</p> <p>2.6 Resolve or refer problems, if required</p> <p>2.7 Retrieve archived information on request</p> <p>2.8 Delete archived information, if required</p> <p>2.9 Conform to requirements of external archive systems, if outsourced from the organisation</p>			

Learner name: \_\_\_\_\_  
Learner signature: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_  
Internal verifier signature: \_\_\_\_\_  
(if sampled)

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Date: \_\_\_\_\_  
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## Unit 39: Support the Management and Development of an Information System

Unit code:	Q228
Unit reference number:	J/601/2518
QCF level:	2
Credit value:	7
Guided learning hours:	40

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### Unit summary

This unit is about supporting the management and evaluation of an information system to meet identified needs in a business environment.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.7	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.3	
3	3.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• training records</li><li>• diary.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	3.2 3.6 – 3.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• diary.</li> </ul>
	3.3 – 3.5	Evidence may be supplied via observation of workplace activities, witness testimony, and learner reports/reflective accounts.
4	4.1 – 4.3	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• feedback</li> <li>• minutes of meetings.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Understand how to contribute to the management of an information system</p>	<p>1.1 Explain the purpose of managing information to meet requirements</p> <p>1.2 Explain the purpose and value of supporting training for users and giving or requesting on-going support</p> <p>1.3 Explain the purpose of complying with legal and organisation requirements when using an information system</p> <p>1.4 Explain the purpose of contributing to the monitoring of an information system in use</p> <p>1.5 Explain the purpose of contributing to the maintenance and updating of an information system</p> <p>1.6 Describe ways of contributing to the maintenance and updating of an information system</p> <p>1.7 Describe the types of problems that may occur with an information system and how to deal with them</p>			
<p>2 Understand how to contribute to the review and further development of an information system</p>	<p>2.1 Explain the purpose and value of contributing to the continuous improvement of an information system</p> <p>2.2 Explain how to identify problems in an information system and report them</p> <p>2.3 Describe ways of contributing to the resolution of problems in an information system</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to contribute to the management of an information system	3.1 Contribute to training on the use of an information system 3.2 Contribute to supporting users, if required 3.3 Monitor own use of an information system 3.4 Confirm legal and organisational requirements for handling information are followed 3.5 Make sure a system is maintained and updated, within limits of own authority 3.6 Identify and report problems when they occur 3.7 Resolve problems within limits of own authority			
4 Be able to contribute to the evaluation of an information system	4.1 Provide feedback on performance of an information system 4.2 Contribute to the evaluation of feedback and prioritising of development needs, if required 4.3 Contribute information to enable further system development			



Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(if sampled)



**Unit 40: Support the Design and Development of an Information System**

**Unit code:** Q316  
**Unit reference number:** L/601/2536  
**QCF level:** 3  
**Credit value:** 7  
**Guided learning hours:** 35

**Unit summary**

This unit is about contributing to the design and development of an information system that will meet identified needs in a business environment.

**Assessment guidance**

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

<b>Learning outcomes</b>	<b>Assessment criteria</b>	<b>Assessment guidance</b>
1	1.1 – 1.2	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.4	
3	3.1 3.3 – 3.5	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• reports</li> <li>• notes of meetings.</li> </ul>

Learning outcomes	Assessment criteria	Assessment guidance
	3.2	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• specification.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q301, Q302, Q303, Q304, Q305, Q317.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the purpose of supporting the design and development of an information system			
2	Understand how to contribute to the design and development of an information system			
3	Be able to contribute to the design and development of an information system			

Learner name: \_\_\_\_\_  
Learner signature: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_  
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(if sampled)

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Date: \_\_\_\_\_  
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## Unit 41: Monitor Information Systems

Unit code:	Q317
Unit reference number:	R/601/2537
QCF level:	3
Credit value:	7
Guided learning hours:	30

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### Unit summary

This unit is about monitoring and evaluating an information system to meet identified needs in a business environment.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.8	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.3	
3	3.1 – 3.2 3.4 – 3.8	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>
	3.3	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• training records.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	3.9 – 3.10	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• feedback</li> <li>• notes of meetings.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q301, Q302, Q303, Q304, Q305.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.



## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand how to monitor an information system	<p>1.1 Explain the purpose and benefits of managing information to meet requirements</p> <p>1.2 Explain the purpose and benefits of providing training and on-going support to users</p> <p>1.3 Explain the purpose of complying with legal and organisational requirements when using an information system</p> <p>1.4 Explain the purpose and benefits of monitoring use of an information system</p> <p>1.5 Describe ways of monitoring use of an information system</p> <p>1.6 Explain the purpose and benefits of maintaining and updating an information system</p> <p>1.7 Describe ways of maintaining and updating an information system</p> <p>1.8 Describe the types of problems that may occur with an information system and how to deal with them</p>			
2 Understand how to review and further develop an information system	<p>2.1 Explain the purpose and benefits of continuously improving an information system</p> <p>2.2 Explain how to identify problems in an information system and analyse them</p> <p>2.3 Describe ways of resolving problems in an information system</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to monitor an information system</p>	<p>3.1 Identify the information to be monitored and the resources available to do so</p> <p>3.2 Contribute to designing a system specification</p> <p>3.3 Provide training on the use of an information system</p> <p>3.4 Provide on-going support to users</p> <p>3.5 Monitor use of an information system</p> <p>3.6 Make sure legal and organisational requirements for handling information are followed</p> <p>3.7 Make sure a system is maintained and updated, if required</p> <p>3.8 Identify, analyse and resolve problems when they occur</p> <p>3.9 Collect feedback on performance of an information system</p> <p>3.10 Provide information to enable further system development to meet agreed specifications</p>			

Learner name: \_\_\_\_\_  
Learner signature: \_\_\_\_\_  
Assessor signature: \_\_\_\_\_  
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## Unit 42: Analyse and Report Data

Unit code:	Q318
Unit reference number:	Y/601/2538
QCF level:	3
Credit value:	6
Guided learning hours:	30

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### Unit summary

This unit is about analysing and reporting data that meets the aims and objectives of the research.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.6	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1	
3	3.1 – 3.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role.
	3.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• feedback obtained.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
4	4.1 – 4.2	<p>Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner’s job role from the following sources:</p> <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• data reported.</li> </ul>

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand how to organise and evaluate data that has been researched	<p>1.1 Describe purpose and benefits of organising data so that it can be analysed</p> <p>1.2 Explain how to evaluate the relevance, validity and reliability of data</p> <p>1.3 Explain how to analyse and prepare researched data so results will be accurate and free from bias</p> <p>1.4 Explain the differences between primary and secondary research methods</p> <p>1.5 Explain the differences between quantitative and qualitative research methods</p> <p>1.6 Describe how to search for relevant data sources</p>			
2 Understand how to report data that has been researched	<p>2.1 Describe ways of reporting data so that it</p> <p>a) meets agreed aims and objectives</p> <p>b) is accurate and free from bias</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to analyse and evaluate data	3.1 Organise data so that it can be analysed and reported 3.2 Select relevant, valid and reliable data to analyse 3.3 Apply analysis and evaluation techniques, as required 3.4 Review data to produce accurate, unbiased results and conclusions 3.5 Check the accuracy of the analysis, and make adjustments, if required 3.6 Obtain feedback on data analysis, if required			
4 Be able to report data	4.1 Present data in agreed format 4.2 Present data to agreed timescale			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
 Learner signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 (*if sampled*)



## Unit 43: Use Office Equipment

Unit code:	Q221
Unit reference number:	H/601/2493
QCF level:	2
Credit value:	4
Guided learning hours:	18

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### Unit summary

This unit is about using a variety of different office equipment following manufacturer's and organisational guidelines.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.3	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.5	
3	3.1 – 3.3	
4	4.1 – 4.3	
5	5.1	
6	6.1	
7	7.1 – 7.9	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Know about different types of office equipment and its uses	<p>1.1 Identify different types of equipment and their uses</p> <p>1.2 Describe the different features of different types of office equipment</p> <p>1.3 Explain why different types of equipment are chosen for tasks</p>			
2 Understand the purpose of following instructions and health and safety procedures	<p>2.1 Explain the purpose of following manufacturer's instructions when using equipment</p> <p>2.2 Explain the purpose of following organisational instructions when using equipment</p> <p>2.3 Identify health and safety procedures for using different types of equipment</p> <p>2.4 Explain the purpose of following health and safety procedures when using equipment</p> <p>2.5 Explain the purpose of keeping equipment clean and hygienic</p>			
3 Understand how to use equipment in a way that minimises waste	<p>3.1 Give examples of waste when using equipment</p> <p>3.2 Give examples of ways to reduce waste</p> <p>3.3 Explain the purpose of minimising waste</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Know about the different types of problems that may occur when using equipment and how to deal with them	4.1 Give examples of equipment problems 4.2 Explain the purpose of following manufacturer's instructions and organisational procedures when dealing with problems 4.3 Give examples of how to deal with problems			
5 Understand the purpose of meeting work standards and deadlines	5.1 Explain the purpose of meeting work standards and deadlines when using equipment			
6 Understand the purpose of leaving equipment and the work area ready for the next user	6.1 Explain the purpose of leaving equipment and the work area ready for the next user			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
7 Be able to use office equipment	7.1 Locate and select equipment needed for a task 7.2 Use equipment following manufacturer's and organisational guidelines 7.3 Use equipment minimising waste 7.4 Keep equipment clean and hygienic 7.5 Deal with equipment problems following manufacturer's and organisational procedures 7.6 Refer problems, if required 7.7 Make sure final work product meets agreed requirements 7.8 Make sure that product is delivered to agreed timescale 7.9 Make sure equipment, resources and work area are ready for the next user			

Learner name:	Date:
Learner signature:	Date:
Assessor signature:	Date:
Internal verifier signature: (if sampled)	Date:



## Unit 44: **Maintain and Issue Stationery Stock Items**

<b>Unit code:</b>	Q222
<b>Unit reference number:</b>	M/601/2495
<b>QCF level:</b>	2
<b>Credit value:</b>	3
<b>Guided learning hours:</b>	14

### Unit summary

This unit is about the procedures involved in keeping a stock of business items that will be used in a business environment in order to complete the day to day work of the organisation.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

<b>Learning outcomes</b>	<b>Assessment criteria</b>	<b>Assessment guidance</b>
1	1.1 – 1.8	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.2	
3	3.1 – 3.2	
4	4.1	
5	5.1	Evidence may be supplied via witness testimony and learner reports/reflective accounts.
	5.2 – 5.3 5.7	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• stock records.</li> </ul>

Learning outcomes	Assessment criteria	Assessment guidance
	5.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• purchase orders.</li> </ul>
	5.5	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos.</li> </ul>
	5.6	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• delivery notes.</li> </ul>
6	6.1 – 6.2	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• stock records</li> <li>• emails</li> <li>• memos.</li> </ul>
7	7.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and learner reports/reflective accounts.



Learning outcomes	Assessment criteria	Assessment guidance
8	8.1	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• emails</li> <li>• memos</li> <li>• appraisals.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand procedures for maintaining and issuing stationery stock items	<p>1.1 Outline organisational requirements for ordering, taking delivery, storing, stock-taking, issuing and disposing of stationery stock items</p> <p>1.2 Outline ways of keeping up-to-date, accurate and legible records of stationery stock items</p> <p>1.3 Explain the purpose of knowing the level of demand for stationery stock items and how this may affect requirements for ordering and stock held</p> <p>1.4 Outline other factors that may affect the future level of demand for stationery stock held</p> <p>1.5 Give examples of suppliers that may be used when ordering stationery stock items</p> <p>1.6 Outline differences between ordering stationery stock items from internal and external suppliers</p> <p>1.7 Outline organisational procedures for issuing stationery stock items</p> <p>1.8 Outline when it may be necessary to ask for receipts for stationery stock items issued</p>			
2 Know how to handle, store and dispose of stationery stock items	<p>2.1 Outline organisational procedures for handling and storing stationery stock items safely and securely</p> <p>2.2 Outline organisational procedures for the correct and safe disposal of stationery stock items</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Understand problems that may occur with maintaining and issuing stationery stock items and how to deal with them	3.1 Describe types of problems that may occur with deliveries and stationery stock items 3.2 Describe organisational procedures for dealing with problems			
4 Understand how to make recommendations for improving stationery stock handling	4.1 Describe organisational procedures for recommending improvements for ordering, taking delivery, storing, stock-taking, issuing and disposing of unwanted or damaged stationery stock items			
5 Be able to maintain stationery stock levels	5.1 Maintain stationery stock items to required levels 5.2 Handle and store stationery stock safely and securely, maintaining its condition and following organisational procedures 5.3 Carry out stock-takes as instructed and report problems 5.4 Order stationery stock from suppliers within limits of own authority 5.5 Chase up orders with suppliers 5.6 Check incoming deliveries against orders and report any problems 5.7 Keep up-to-date, accurate and legible records of stationery stock delivered and held			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
6 Be able to issue items from stationery stock	6.1 Issue stationery stock items as requested, following organisational procedures 6.2 Keep up-to-date, accurate and legible records of stationery stock items issued			
7 Be able to deal with unwanted or damaged items of stationery stock	7.1 Dispose of unwanted or damaged stationery stock items safely, following organisational procedures and legal requirements			
8 Be able to make recommendations to improve stationery stock handling	8.1 Identify and recommend ways in which systems for receiving, issuing and disposing of stationery stock could be improved, as required			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

## Unit 45: Order Products and Services

Unit code:	Q319
Unit reference number:	D/601/2539
QCF level:	3
Credit value:	5
Guided learning hours:	35

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### Unit summary

This unit is about the ordering and supply of products and services for an organisation, ensuring that the products and services supplied meet the needs of the organisation and represent the best value for money.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.8	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.3	
3	3.1 – 3.3	
4	4.1 4.3 – 4.4	Evidence may be supplied via learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• information used.</li></ul>
	4.2	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• budgets.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	4.5	Evidence may be supplied via learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• orders</li> <li>• delivery notes.</li> </ul>
	4.6	Evidence may be supplied via learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos.</li> </ul>
	4.7	Evidence may be supplied via learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• contract.</li> </ul>
5	5.1	Evidence may be supplied via learner reports/reflective accounts and professional discussion.
	5.2	Evidence may be supplied via learner reports/reflective accounts, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• records of monitoring.</li> </ul>
	5.3	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos.</li> </ul>

Learning outcomes	Assessment criteria	Assessment guidance
6	6.1	Evidence may be supplied via learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• records of monitoring.</li> </ul>
	6.2	Evidence may be supplied via learner reports/reflective accounts and professional discussion.
	6.3	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>• letters</li> <li>• emails</li> <li>• memos</li> <li>• appraisals</li> <li>• performance review.</li> </ul>

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand how to identify, select and negotiate the supply of products and services	<p>1.1 Identify different sources of information on products and services for an organisation</p> <p>1.2 Explain how to use different sources of information on products and services</p> <p>1.3 Describe how to write a specification for a product or service</p> <p>1.4 Identify sources of products and services that meet the quality expectations of an organisation</p> <p>1.5 Explain the purpose of selecting products and services that represent best value for money</p> <p>1.6 Describe how to negotiate best value for money</p> <p>1.7 Explain the purpose of developing and maintaining good relationships with suppliers, and ways of doing so</p> <p>1.8 Describe a supply chain and how it works</p>			
2 Understand organisational requirements and policies for the ordering and supply of products and services	<p>2.1 Describe the procedures for the ordering and supply of products and services for an organisation</p> <p>2.2 Describe the needs and priorities for the ordering and supply of products and services for an organisation</p> <p>2.3 Explain the purpose of having organisational policies for the acceptance of gifts and hospitality</p>			



Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Understand how to monitor, evaluate and improve procedures for the ordering and supply of products and services	3.1 Explain the purpose of monitoring and evaluating procedures for the ordering and supply of products and services, and ways of doing so  3.2 Describe actions that may be taken to improve efficiency in the ordering and supply of products and services  3.3 Describe ways of getting better value for money for products and services provided			
4 Be able to follow organisational procedures for the ordering and supply of products and services	4.1 Use available information to keep up to date with products and services in own area of work  4.2 Agree a budget and specification for products or services to be ordered  4.3 Identify sources of products and services that meet the quality specification(s) of the organisation  4.4 Select the product or service which represents best value for money  4.5 Procure product(s) or service(s) following organisational procedures  4.6 Negotiate with selected supplier(s) to reach an agreement which offers good value for money and which is acceptable to both parties, within limits of own authority  4.7 Agree a contact for the supply of product(s) or service(s), within limits of own authority			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to maintain relationships with suppliers of products and services and deal with problems	5.1 Take actions to create and maintain partnerships with suppliers to improve quality and cut costs, within limits of own authority 5.2 Monitor the performance of suppliers in line with the terms of the contract 5.3 Deal with problems as they occur, seeking support from others, where necessary			
6 Be able to monitor, evaluate and make recommendations to improve the ordering and supply of products and services	6.1 Monitor the ordering and supply of products and services for effectiveness and efficiency 6.2 Evaluate the ordering and supply of products and services and identify areas for improvement 6.3 Suggest ways to improve effectiveness and efficiency and obtain better value for money for the supply of products and services			

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(if sampled)

## Unit 46: Agree a Budget

Unit code:	Q330
Unit reference number:	J/601/2552
QCF level:	3
Credit value:	4
Guided learning hours:	25

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### Unit summary

This unit is about developing and agreeing a budget for a department or section within a business.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.6	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.2	Evidence may be supplied via learner reports/reflective accounts.
	2.3	Evidence may be supplied via learner reports/reflective accounts, professional discussion and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• draft budget.</li></ul>
	2.4	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• budget.</li></ul>

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand how to develop budgets	<p>1.1 Explain how to use estimations when developing a draft budget</p> <p>1.2 Explain how to identify priorities and financial resources needed when preparing a budget</p> <p>1.3 Explain the purpose and benefits of identifying priorities when preparing a budget</p> <p>1.4 Explain the purpose and benefits of evaluating and justifying estimated costs and income</p> <p>1.5 Describe procedures for negotiating superseded budgets</p> <p>1.6 Describe skills needed for agreeing budgets</p>			
2 Be able to agree a budget	<p>2.1 Identify financial resources needed to achieve goals and objectives for agreeing a budget</p> <p>2.2 Evaluate and justify costs and risks</p> <p>2.3 Prepare a draft budget</p> <p>2.4 Negotiate and agree a budget</p>			

Learner name: \_\_\_\_\_  
Learner signature: \_\_\_\_\_  
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(if sampled)

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## Unit 47: Respond to Change in a Business Environment

Unit code:	Q227
Unit reference number:	F/601/2517
QCF level:	2
Credit value:	3
Guided learning hours:	16

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### Unit summary

This unit is about recognising the effects of changes in workplace activities and the people who carry them out.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.3	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.8	
3	3.1 – 3.3	
4	4.1 4.4	Evidence may be supplied via learner reports/reflective accounts.
	4.2	Evidence may be supplied via learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"><li>• letters</li><li>• emails</li><li>• memos.</li></ul>

Learning outcomes	Assessment criteria	Assessment guidance
	4.3	Evidence may be supplied via learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>tasks completed.</li> </ul>
	4.5. – 4.7	Evidence may be supplied via witness testimony and learner reports/reflective accounts.
5	5.1	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>feedback given by learner.</li> </ul>
	5.2	Evidence may be supplied via learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources: <ul style="list-style-type: none"> <li>letters</li> <li>emails</li> <li>memos.</li> </ul>

Evidence generated for this unit of assessment may contribute towards other units including: Units Q201, Q202, Q203, Q205.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.



## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the causes and effects of change in a business environment	<p>1.1 Give examples of changes in working practices in a business environment, and explain why they are happening</p> <p>1.2 Describe the possible effects of changes in working practices on people within a business environment</p> <p>1.3 Explain how change can benefit an organisation, team and individual</p>			
2 Understand own role in supporting change	<p>2.1 Describe ways in which individuals can support change in a business environment</p> <p>2.2 Explain the purpose and benefits of contributing to planning for change</p> <p>2.3 Explain how individuals can prepare for changes within a business environment and in ways of working</p> <p>2.4 Describe the types of support that people need during change</p> <p>2.5 Explain the benefits of good communication with others and accurate information during change</p> <p>2.6 Describe how to identify the effects of changes on own work and reasons for doing so</p> <p>2.7 Explain the purpose of reviewing the effects of changes on people, processes and outcomes</p> <p>2.8 Describe ways of reviewing the effects of changes on people, processes and outcomes</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Understand own role in responding to change	3.1 Explain the purpose of change as part of a process of continuous improvement 3.2 Explain the possible effects of changes on own values 3.3 Explain the benefits of responding positively to changes			
4 Be able to respond to change	4.1 Identify changes needed in own area of work 4.2 Make suggestions for change 4.3 Complete own work tasks using changed procedures or ways of working 4.4 Identify where training or other support is needed 4.5 Actively seek support, as required 4.6 Give support to other people during change, or seek support, as required 4.7 Ask questions to clarify issues			
5 Be able to support the evaluation of change	5.1 Give feedback on the effects of changes in own work 5.2 Make suggestions for further actions, as required			

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## Unit 48: **Contribute to Innovation in a Business Environment**

<b>Unit code:</b>	Q326
<b>Unit reference number:</b>	A/601/2547
<b>QCF level:</b>	3
<b>Credit value:</b>	4
<b>Guided learning hours:</b>	30

### Unit summary

This unit is about making contributions to improving ways of working, products or services, by questioning, researching and actively developing ideas for new ways of working, products or services which can then be put forward as suggestions to decision-makers.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

<b>Learning outcomes</b>	<b>Assessment criteria</b>	<b>Assessment guidance</b>
1	1.1 – 1.2	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.9	
3	3.1 – 3.2	
4	4.1 – 4.4	Evidence may be supplied via witness testimony, professional discussion, learner reports/reflective accounts and inspection of products, using evidence appropriate to the learner's job role from the following sources:
5	5.1 – 5.2	
6	6.1 – 6.5	

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1	Understand the purpose and benefits of innovation in a business environment	<p>1.1 Explain the purpose of innovation as a way of staying competitive and offering new solutions</p> <p>1.2 Explain the purpose of questioning existing ways of working in own area of work and assumptions about them</p>		
2	Understand how to contribute to research, develop and review ideas for new approaches and solutions	<p>2.1 Explain the purpose of reviewing existing working methods, products or services</p> <p>2.2 Explain ways of reviewing existing working methods, products or services</p> <p>2.3 Identify sources of information for new approaches and solutions</p> <p>2.4 Describe ways of collecting information on possible improvements</p> <p>2.5 Explain the purpose of working with others when developing new approaches and solutions</p> <p>2.6 Explain the benefits of working with others when agreeing how to present ideas to decision-makers, and ways of doing so</p> <p>2.7 Explain how to work with others to develop and agree an idea</p>		

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>2.8 Explain how to decide when an idea is or is not possible</p> <p>2.9 Explain the purpose of reviewing and learning from mistakes</p>			
3	<p>3.1 Explain the purpose of selling ideas to decision-makers</p> <p>3.2 Describe how to present and sell suggestions for new approaches and solutions to decision-makers to achieve a positive outcome</p>			
4	<p>4.1 Be able to contribute to research and develop ideas</p> <p>4.2 Question constructively existing ways of working in own area of responsibility</p> <p>4.3 Contribute to researching and identifying possible improvements to working methods, products or services in own area of responsibility</p> <p>4.4 Contribute to the collection of information that can be used to develop ideas for new approaches and solutions</p> <p>4.5 Agree criteria for evaluating ideas including fit with organisational aims and objectives</p>			
5	<p>5.1 Be able to present suggestion for new approaches and solutions</p> <p>5.2 Present and sell suggestions for new approaches and/or solutions</p> <p>5.3 Communicate risks to others in a suitable format</p>			



Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>6 Be able to evaluate, review and make suggestions for new approaches and solutions</p>	<p>6.1 Contribute to the evaluation of ideas for new approaches and solutions using  a) fit with organisational aims and objectives  b) other agreed criteria</p> <p>6.2 Evaluate ideas to challenge own assumptions and thinking about ways of working, products or services</p> <p>6.3 Contribute to the selling of ideas to others</p> <p>6.4 Seek feedback on ideas, analyse feedback, and show a willingness to compromise</p> <p>6.5 Contribute to the assessment of idea(s) and decide whether a suggestion for a new approach/solution is possible</p>			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

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*(if sampled)*



## **Unit 49: Administer Human Resources Records**

**Unit code:** 2010\_BA\_2\_29

**Unit reference number:** T/601/2790

**QCF level:** 2

**Credit value:** 3

**Guided learning hours:** 20

### **Unit summary**

This unit covers the knowledge and understanding learners need to administer Human Resource records. It also covers the practical application of this knowledge and understanding.

### **Assessment guidance**

Further guidance has not been provided for this unit.

### **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand how to create personnel files for new starters	<p>1.1 Describe the systems, procedures and software used by the organisation for administering Human Resource records</p> <p>1.2 Describe the information that should be entered in a new personnel file</p>			
2 Understand how to maintain Human Resource information	<p>2.1 Explain how to enter and update Human Resource information in a personnel file</p> <p>2.2 Describe the Human Resource information that should be held for members of staff</p> <p>2.3 Explain the action that should be taken if Human Resource information is incomplete</p>			
3 Understand how to report Human Resource information	<p>3.1 Describe the types of Human Resource reports that may be requested</p> <p>3.2 Explain how to produce reports from individual or multiple Human Resource files</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Understand the organisational and legal requirements for administering Human Resource records</p>	<p>4.1 Describe the current legislation that applies when dealing with Human Resource records</p> <p>4.2 Clarify the limits and scope of responsibilities and authority in administering HR records</p> <p>4.3 Describe the data protection principles that apply to HR records</p> <p>4.4 Explain organisation procedures for confidentiality of HR records</p> <p>4.5 Explain organisation procedures for security of HR records</p> <p>4.6 Explain the purpose of confidentiality and security of HR information</p> <p>4.7 Describe the potential consequences of a breach of confidentiality or security</p> <p>4.8 Explain organisation policy and procedure for removal of out of date HR information</p> <p>4.9 Explain organisation policy and procedure for archiving HR information</p>			
<p>5 Be able to create personnel files for new starters</p>	<p>5.1 Open a new personnel file</p> <p>5.2 Record required information about employee</p> <p>5.3 File relevant employee documents</p> <p>5.4 Process monitoring data, as appropriate</p> <p>5.5 Check that information is complete, requesting missing information where necessary</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
6	Be able to maintain Human Resource information	6.1 Keep required personnel information up to date 6.2 Maintain records of personnel information 6.3 Process and file relevant correspondence and documentation		
7	Be able to report Human Resource information	7.1 Provide information from individual personnel files as requested 7.2 Provide management information reports as requested		
8	Be able to comply with organisational and legal requirements	8.1 Comply with organisational and legal requirements for confidentiality, freedom of information, data protection and security of information 8.2 Remove out of date information in line with organisational policy and procedures 8.3 Archive relevant information in line with current legislation and organisational policy and procedures		

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_

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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

**Unit 50: Administer the Recruitment and Selection Process**

**Unit code:** 2010\_BA\_2\_30

**Unit reference number:** A/601/2791

**QCF level:** 2

**Credit value:** 4

**Guided learning hours:** 30

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**Unit summary**

This unit covers the knowledge and understanding learners need to administer the recruitment and selection process. It also covers the practical application of this knowledge and understanding.

**Assessment guidance**

No further guidance has been provided for this unit.

**Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Understand how to advertise job vacancies</p>	<p>1.1 Explain organisational policies, procedures and constraints that affect the area of responsibility</p> <p>1.2 Explain the procedures to identify and process personnel requirements in the organisation</p> <p>1.3 Explain ways in which personnel requirements are expressed in job descriptions and persons specifications</p> <p>1.4 Explain how to interpret personnel requirements in job descriptions and persons specifications</p> <p>1.5 Describe the current legislation that applies when dealing with recruitment and selection</p> <p>1.6 Clarify the limits and scope of their responsibilities and authority in administering the recruitment and selection process</p> <p>1.7 Describe the types of information to include in a job advertisement</p> <p>1.8 Explain the legal/organisational requirements that affect the type of information in the job advertisement</p> <p>1.9 Explain how to place advertisements in different locations</p> <p>1.10 Explain how to liaise with recruitment agencies</p>			



Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to respond to potential applicants	2.1 Describe the type of information that should be in an application pack 2.2 Describe the types of queries that applicants may have 2.3 Explain how to respond to the queries that applicants may have 2.4 Explain how to keep records of responses received 2.5 Clarify the purpose of keeping records of responses received			
3 Understand how to administer the selection process	3.1 Describe organisational procedures used to shortlist the applicants 3.2 Describe the procedures and methods for contacting shortlisted learners to invite them to participate in the selection process 3.3 Explain how to process feedback for unsuccessful applicants 3.4 Describe the different types of selection processes that may be used and how they work 3.5 Clarify the selection processes used in the organisation and their role in those 3.6 Explain the administrative support needed for different types of selection processes 3.7 Explain the procedures for obtaining the resources needed for the selection process			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	<p>3.8 Describe the range of documentation that is used for selection by their organisation</p> <p>3.9 Clarify the purpose of giving learners a favourable impression of the organisation</p> <p>3.10 Describe the range of records that must be kept following the selection process</p> <p>3.11 Explain the purpose of following organisational procedures for keeping records following the selection process</p>			
4 Understand how to administer the appointment process	<p>4.1 Describe the range of pre-employment checks</p> <p>4.2 Explain how to carry out pre-employment checks</p> <p>4.3 Explain how to format offer letters and employment contracts</p> <p>4.4 Explain the purpose of confidentiality and security of record keeping</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to advertise job vacancies	5.1 Confirm the personnel requirements with the responsible person 5.2 Confirm the information that will appear in the job advertisement 5.3 Confirm how the vacancy will be advertised 5.4 Advertise the vacancy as agreed 5.5 Liaise with relevant agencies to confirm details of job vacancies 5.6 Liaise with the relevant agencies to make sure they understand the requirements of the organisation			
6 Be able to respond to potential applicants	6.1 Send out application packs or other information to potential applicants 6.2 Respond appropriately to queries from potential applicants 6.3 Maintain records of responses received			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
7 Be able to administer the selection process	7.1 Collate applications and make available to those involved in the selection 7.2 Invite shortlisted learners to take part in the selection process 7.3 Process feedback to unsuccessful applicants 7.4 Keep records of responses from shortlisted learners 7.5 Provide appropriate support for the selection process 7.6 Help to make sure learners have a positive impression of the organisation 7.7 Keep records of the outcomes of the selection process			
8 Be able to administer the appointment process	8.1 Carry out appropriate pre-employment checks 8.2 Format and send out offer letters and employment contracts 8.3 Maintain records of the recruitment and selection process in line with current legislation and organisational requirements			

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**Unit 51: Administer Parking Dispensations****Unit code:** 2010\_BA\_2\_57**Unit reference number:** J/601/2647**QCF level:** 2**Credit value:** 4**Guided learning hours:** 14**Unit summary**

This unit covers the knowledge and understanding learners need to administer dispensations. It also covers the practical application of this knowledge and understanding.

**Assessment guidance**

No further guidance has been provided for this unit.

**Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Understand the organisational and legal context for administering parking dispensations</p>	<p>1.1 Describe the services that they are responsible for</p> <p>1.2 Clarify the limits and scope of their responsibilities and authority in providing services</p> <p>1.3 Explain the organisation's policies, procedures and constraints that affect services in their area of responsibility</p> <p>1.4 Explain how to apply the organisation's policies, procedures and constraints that affect services in their area of responsibility</p> <p>1.5 Describe the current legislation, Traffic Regulation Orders and other regulations that apply</p> <p>1.6 The requirements of the Data Protection Act and its implications for own role</p> <p>1.7 Describe the specialist software used by the organisation for the issue of permits, season tickets, suspensions, dispensations/waivers and blue badges</p> <p>1.8 Explain how to use the specialist software used by the organisation for the issue of permits, season tickets, suspensions, dispensations/waivers and blue badges</p>			



Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Understand the processes involved in administering parking dispensations</p>	<p>2.1 Explain the criteria, policy and procedures in relation to permits, season tickets, suspensions, dispensations /waivers and blue badges</p> <p>2.2 Clarify the range of checks that are relevant to applications</p> <p>2.3 Explain how and when to carry out the range of checks that are relevant to applications</p> <p>2.4 Clarify the organisation’s anti-fraud policies and procedures</p> <p>2.5 Explain how to operate the organisation’s anti-fraud policies and procedures</p> <p>2.6 Describe the evidence required to support an application for a permit, season ticket, suspension, dispensation/waiver or blue badge</p> <p>2.7 Explain the payment and refund processing within the organisation</p> <p>2.8 Explain how to communicate effectively with customers and other relevant departments</p> <p>2.9 Clarify the importance of the audit trail of controlled stationery</p> <p>2.10 Explain how to update and maintain records as necessary</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to receive and process applications for parking dispensations</p>	<p>3.1 Advise customers on criteria for eligibility</p> <p>3.2 Review applications and supporting evidence against published criteria</p> <p>3.3 Seek additional evidence from the customer if required</p> <p>3.4 Carry out relevant checks in accordance with organisational procedures</p> <p>3.5 Where necessary, seek opinions from appropriate medical professionals</p> <p>3.6 Handle supporting documentation securely and in line with current legislation or relevant terms and conditions</p> <p>3.7 Make a decision to approve or decline the application</p>			
<p>4 Be able to issue documentation for parking dispensations</p>	<p>4.1 Communicate the decision to the customer, return documentation where necessary and issue appropriate paperwork</p> <p>4.2 Maintain appropriate records including renewals</p> <p>4.3 Process payments and handle refunds in line with organisational procedures</p> <p>4.4 Communicate the decision or information to other relevant departments</p>			

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## Unit 52: Use Occupational and Safety Guidelines when using Keyboards

Unit code:	Q113
Unit reference number:	T/601/2465
QCF level:	1
Credit value:	2
Guided learning hours:	20

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### Unit summary

This unit is about following occupational health and safety guidelines when using keyboards and workstation care and maintenance.

### Assessment guidance

The following is a guide, the evidence suggested is neither mandatory nor exclusive.

Learning outcomes	Assessment criteria	Assessment guidance
1	1.1 – 1.4	Evidence may be supplied via learner reports/reflective accounts, professional discussion and questioning.
2	2.1 – 2.4	Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion and learner reports/reflective accounts.

### Assessment methodology

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Understand the purpose of occupational health and safety procedures when using keyboards and workstation care and maintenance	<p>1.1 State occupational health and safety guidelines in relation to using keyboards</p> <p>1.2 Explain the purpose of following occupational health and safety guidelines for using keyboards</p> <p>1.3 Describe how to position fingers, wrists, forearms and back in relation to the equipment being used</p> <p>1.4 Describe procedures for workstation care and maintenance</p>			
2 Be able to use occupational health and safety guidelines	<p>2.1 Demonstrate correct positioning of fingers, wrists, forearms and back in relation to the equipment being used</p> <p>2.2 Follow procedures for workstation care and maintenance</p> <p>2.3 Follow occupational health and safety guidelines for using keyboards</p> <p>2.4 Use techniques to prevent repetitive strain syndrome in accordance with occupational health and safety guidelines</p>			

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## **Unit 53: Bespoke Software (Level 1)**

<b>Unit code:</b>	BS1
<b>Unit reference number:</b>	A/502/4395
<b>QCF level:</b>	1
<b>Credit value:</b>	2
<b>Guided learning hours:</b>	15

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### **Unit summary**

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.

This unit is about the skills and knowledge needed by an IT user to use basic bespoke software tools and techniques appropriately for straightforward or routine information. Any aspect that is unfamiliar will require support and advice from others.

Bespoke software tools and techniques will be defined as 'basic' because:

- the software tools and functions involved will be pre-defined or commonly used;
- the range of inputting, manipulation and outputting techniques are straightforward or routine; and
- the data type and structure will be predetermined or familiar.

### **Forbidden combination**

This unit must not be taken with Unit 64: *Bespoke Software (Level 2)* (F/502/4396).

## **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Input, organise and combine information using bespoke software	<p>1.1 Input relevant information accurately into existing templates and/or files so that it is ready for processing</p> <p>1.2 Organise and combine information of different forms or from different sources</p> <p>1.3 Follow local and/or legal guidelines for the storage and use of data where available</p> <p>1.4 Respond appropriately to data entry error messages</p>			
2 Use tools and techniques to edit, process, format and present information	<p>2.1 Use appropriate tools and techniques to edit, process and format information</p> <p>2.2 Check information meets needs, using IT tools and making corrections as appropriate</p> <p>2.3 Use appropriate presentation methods and accepted layouts</p>			

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## Unit 54: Data Management Software (Level 1)

Unit code:	DMS1
Unit reference number:	F/502/4558
QCF level:	1
Credit value:	2
Guided learning hours:	15

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### Unit summary

This is the ability to use a software application designed to store and retrieve data needed for a variety of business functions. It also includes an understanding of the features and facilities of the software and the purpose for which the data is stored. Data management software is often implemented on relational database systems by providing predefined file and record structures, processes, reports and data-entry screens. This is about the use of these predefined objects.

This unit is about the skills and knowledge required by an IT user to use basic data management software tools and techniques to:

- enter straightforward or routine information using pre-set data-entry screens;
- retrieve information by running predefined methods; and
- produce reports using predefined menus or short cuts.

The tools and techniques will be described as 'basic' because:

- the tools and functions will be predefined or commonly used; and
- the techniques for inputting, manipulation and outputting data will be straightforward or routine.

The structure and functionality of the data management system will be predefined. Any aspects that are unfamiliar will require support and advice from others.

### Forbidden combination

This unit must not be taken with Unit 65: *Data Management Software (Level 2)* (J/502/4559).

## **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Enter, edit and maintain data records in a data management system	<p>1.1 Identify the security procedures used to protect data</p> <p>1.2 Enter data accurately into records to meet requirements</p> <p>1.3 Locate and amend individual data records</p> <p>1.4 Check data records meet needs, using IT tools and making corrections as necessary</p> <p>1.5 Respond appropriately to data entry error messages</p> <p>1.6 Follow local and/or legal guidelines for the storage and use of data where available</p>			
2 Retrieve and display data records to meet requirements	<p>2.1 Search for and retrieve information using predefined methods to meet given requirements</p> <p>2.2 Identify which report to run to output the required information</p> <p>2.3 Select and view specified reports to output information to meet given requirements</p>			

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## **Unit 55: Database Software (Level 1)**

<b>Unit code:</b>	DS1
<b>Unit reference number:</b>	H/502/4553
<b>QCF level:</b>	1
<b>Credit value:</b>	3
<b>Guided learning hours:</b>	20

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### **Unit summary**

This is the ability to use a software application designed to organise and store structured information and generate reports.

This unit is about the skills and knowledge required by an IT user to use database software tools and techniques to:

- enter straightforward or routine information into a database;
- set up a single table in a flat file database;
- retrieve information by running routine queries; and
- produce reports using predefined menus or short cuts.

The structure and functionality of the database will be predefined. Any aspects that are unfamiliar will require support and advice from others.

Database tools and techniques will be described as 'basic' because:

- the tools and functions will be predefined or commonly used; and
- the techniques for inputting, manipulation and outputting will be straightforward or routine.

### **Forbidden combination**

This unit must not be taken with Unit 66: *Database Software (Level 2)* (M/502/4555).

## **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Enter, edit and organise structured information in a database	<p>1.1 Identify the main components of a database</p> <p>1.2 Create a database table for a purpose using specified fields</p> <p>1.3 Enter structured data into records to meet requirements</p> <p>1.4 Locate and amend data records</p> <p>1.5 Respond appropriately to data entry error messages</p> <p>1.6 Check data meets needs, using IT tools and making corrections as necessary</p>			
2 Use database software tools to extract information and produce reports	<p>2.1 Identify queries which meet information requirements</p> <p>2.2 Run simple database queries</p> <p>2.3 Identify reports which meet information requirements</p> <p>2.4 Generate and print predefined database reports</p>			

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## Unit 56: Improving Productivity Using IT (Level 1)

Unit code:	IPU1
Unit reference number:	T/502/4153
QCF level:	1
Credit value:	3
Guided learning hours:	20

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### Unit summary

The use of IT tools and systems can improve the productivity and efficiency of work activities in a variety of contexts.

This unit is about the skills and knowledge needed by the IT user to plan and review their use of predefined or commonly used IT tools for straightforward or routine activities. As a result of reviewing their work, they will be able to identify and use automated methods or alternative ways of working to improve productivity.

An activity will typically be 'straightforward or routine' because:

- the task or context will be familiar and involve few factors (for example, time available, audience needs, message, structure); and
- the techniques used will be familiar or commonly undertaken.

### Forbidden combination

This unit must not be taken with Unit 67: *Improving Productivity using IT (Level 2)* (J/502/4156).

### Assessment guidance

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Plan the use of appropriate IT systems and software to meet requirements	1.1 Identify the purpose for using IT 1.2 Identify the methods, skills and resources required to complete the task successfully 1.3 Plan how to carry out the task using IT to achieve the required purpose and outcome 1.4 Identify reasons for choosing particular IT systems and software applications for the task 1.5 Select IT systems and software applications as appropriate for the purpose 1.6 Identify any legal or local guidelines or constraints that may affect the task or activity			
2 Use IT systems and software efficiently to complete planned tasks	2.1 Identify automated routines to improve productivity 2.2 Use automated routines that aid efficient processing or presentation 2.3 Complete planned tasks using IT			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Review the selection and use of IT tools to make sure that work activities are successful	3.1 Review outcomes to make sure they meet the requirements of the task and are fit for purpose 3.2 Decide whether the IT tools selected were appropriate for the task and purpose 3.3 Identify the strengths and weaknesses of the completed task 3.4 Identify ways to make further improvements to work			

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## **Unit 57: IT Security for Users (Level 1)**

<b>Unit code:</b>	ITS1
<b>Unit reference number:</b>	R/502/4256
<b>QCF level:</b>	1
<b>Credit value:</b>	1
<b>Guided learning hours:</b>	10

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### **Unit summary**

This is the ability to protect hardware, software and the data within an IT system against theft, malfunction and unauthorised access.

This unit is about the skills and knowledge needed by the IT User to identify day-to-day security risks and the laws and guidelines that affect the use of IT; and use simple methods to protect software and personal data (eg risks from people getting access to it who are not authorised, from viruses or from hardware not working properly).

### **Forbidden combination**

This unit must not be taken with Unit 68: *IT Security for Users (Level 2)* (Y/502/4257).

### **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Use appropriate methods to minimise security risks to IT systems and data</p>	<p>1.1 Identify security issues that may threaten system performance</p> <p>1.2 Take appropriate security precautions to protect IT systems and data</p> <p>1.3 Identify threats to information security associated with the widespread use of technology</p> <p>1.4 Take appropriate precautions to keep information secure</p> <p>1.5 Follow relevant guidelines and procedures for the secure use of IT</p> <p>1.6 Describe why it is important to back-up data securely</p> <p>1.7 Ensure personal data is backed up to appropriate media</p>			

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## **Unit 58: Presentation Software (Level 1)**

<b>Unit code:</b>	PS1
<b>Unit reference number:</b>	K/502/4621
<b>QCF level:</b>	1
<b>Credit value:</b>	3
<b>Guided learning hours:</b>	20

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### **Unit summary**

This is the ability to use software applications to produce effective presentations, which include a combination of media (eg images, animation and sound) for education, entertainment or information sharing.

This unit is about the skills and knowledge required by an IT user to use a range of basic presentation software tools and techniques to produce straightforward or routine presentations. Any aspect that is unfamiliar will require support and advice from others.

Presentation tools and techniques at this level are described as 'basic' because:

- the software tools and functions will be predefined or commonly used;
- the range of entry, manipulation and outputting techniques will be straightforward or routine; and
- the inputting, manipulating and outputting of the information will be predetermined, straightforward or routine.

### **Forbidden combination**

This unit must not be taken with Unit 69: *Presentation Software (Level 2)* (M/502/4622).

## **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Input and combine text and other information within presentation slides	1.1 Identify what types of information are required for the presentation 1.2 Select and use different slide layouts as appropriate for different types of information 1.3 Enter information into presentation slides so that it is ready for editing and formatting 1.4 Identify any constraints which may affect the presentation 1.5 Combine information of different forms or from different sources for presentations 1.6 Store and retrieve presentation files effectively, in line with local guidelines and conventions where available			
2 Use presentation software tools to structure, edit and format slides	2.1 Identify what slide structure to use 2.2 Select and use an appropriate template to structure slides 2.3 Select and use appropriate techniques to edit slides 2.4 Select and use appropriate techniques to format slides			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Prepare slides for presentation to meet needs	3.1 Identify how to present slides to meet needs and communicate effectively 3.2 Prepare slides for presentation 3.3 Check presentation meets needs, using IT tools and making corrections as necessary			

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## **Unit 59: Set up an IT System (Level 1)**

<b>Unit code:</b>	ITS1
<b>Unit reference number:</b>	Y/502/4209
<b>QCF level:</b>	1
<b>Credit value:</b>	3
<b>Guided learning hours:</b>	20

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### **Unit summary**

This is the ability to safely set up the components of an IT system (eg personal computer - PC, keyboard, mouse and printer), removable storage media (eg data stick or external DVD drive), communication service to access the Internet and associated software and check that they are working properly.

This unit is about the skills and knowledge to connect up the basic components of an IT system, removable storage media and a communication service safely using default setup routines and run simple tests to check it is working successfully.

### **Forbidden combination**

This unit must not be taken with Unit 70: *Set up an IT System (Level 2)* (L/502/4210).

### **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Connect up a personal computer, printer and peripheral devices safely	<p>1.1 Identify what IT system components, storage and peripheral devices are needed and how to connect them</p> <p>1.2 Identify any health and safety issues associated with setting up an IT system</p> <p>1.3 Connect up the components of an IT system safely, including a printer and other peripheral devices</p> <p>1.4 Connect removable storage media to a PC safely</p>			
2 Connect to an IT communication service	<p>2.1 Connect communication hardware safely to a PC</p> <p>2.2 Identify the details needed to connect to an internet Service Provider (ISP)</p> <p>2.3 Connect to a communication service from a PC</p>			
3 Set up software for use	<p>3.1 Configure the user interface to meet needs</p> <p>3.2 Identify what security precautions need to be addressed when connecting to the internet</p> <p>3.3 Set up and configure virus protection software</p> <p>3.4 Set up files and software to meet needs</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Check that the IT system and communication service are working successfully	4.1 Identify simple tests that can be used to check the system 4.2 Identify simple communication tests that can be used to check the internet connection 4.3 Run tests to check that the system and communication service are working successfully 4.4 Identify how to report faults and seek expert help 4.5 Respond to error messages and report faults as appropriate			

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## **Unit 60: Spreadsheet Software (Level 1)**

<b>Unit code:</b>	SS1
<b>Unit reference number:</b>	A/502/4624
<b>QCF level:</b>	1
<b>Credit value:</b>	3
<b>Guided learning hours:</b>	20

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### **Unit summary**

This is the ability to use a software application designed to record data in rows and columns, perform calculations with numerical data and present information using charts and graphs.

This unit is about the skills and knowledge required by an IT user to use a range of basic spreadsheet software tools and techniques to produce, present and check spreadsheets that are straightforward or routine. Any aspect that is unfamiliar will require support and advice from others.

Spreadsheet software tools and techniques will be described as 'basic' because:

- the range of data entry, manipulation, formatting and outputting techniques are straightforward;
- the tools, formulas and functions involved will be predetermined or commonly used (for example, sum, divide, multiply, take away and fractions); and
- the structure and functionality of the spreadsheet will be predetermined or familiar.

### **Forbidden combination**

This unit must not be taken with Unit 71: *Spreadsheet Software (Level 2)* (F/502/4625).

## **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Use a spreadsheet to enter, edit and organise numerical and other data	<p>1.1 Identify what numerical and other information is needed and how the spreadsheet should be structured to meet needs</p> <p>1.2 Enter and edit numerical and other data accurately</p> <p>1.3 Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available</p>			
2 Use appropriate formulas and tools to summarise and display spreadsheet information	<p>2.1 Identify how to summarise and display the required information</p> <p>2.2 Use functions and formulas to meet calculation requirements</p> <p>2.3 Use spreadsheet tools and techniques to summarise and display information</p>			
3 Select and use appropriate tools and techniques to present spreadsheet information effectively	<p>3.1 Select and use appropriate tools and techniques to format spreadsheet cells, rows and columns</p> <p>3.2 Identify which chart or graph type to use to display information</p> <p>3.3 Select and use appropriate tools and techniques to generate, develop and format charts and graphs</p> <p>3.4 Select and use appropriate page layout to present and print spreadsheet information</p> <p>3.5 Check information meets needs, using spreadsheet tools and making corrections as necessary</p>			

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## **Unit 61: Using Collaborative Technologies (Level 1)**

<b>Unit code:</b>	UCT1
<b>Unit reference number:</b>	A/502/4378
<b>QCF level:</b>	1
<b>Credit value:</b>	3
<b>Guided learning hours:</b>	20

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### **Unit summary**

This is the ability to use IT tools and devices for collaborative working and communications, such as web or video conferencing, instant messaging/chat, online phone and video calls, online forums, social networking sites, wikis and other centralised depositories for documents, blogging, RSS and data feeds, bulk SMS or online work management tools.

This unit is about the skills and knowledge to safely use IT tools and devices to work collaboratively by:

- preparing and accessing IT tools and devices;
- playing a responsible and active role in real-time communication; and
- contributing relevant information.

### **Forbidden combination**

This unit must not be taken with Unit 72: *Using Collaborative Technologies (Level 2)* (F/502/4379).

### **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Stay safe and secure when using collaborative technology	<p>1.1 Follow guidelines for working with collaborative technology</p> <p>1.2 Identify risks in using collaborative technology and why it is important to avoid them</p> <p>1.3 Carry out straightforward checks on others' online identities and different types of information</p> <p>1.4 Identify when and how to report online safety and security issues</p> <p>1.5 Identify what methods are used to promote trust</p>			
2 Set up and access IT tools and devices for collaborative working	<p>2.1 Set up IT tools and devices that will enable you to contribute to collaborative work</p> <p>2.2 Identify the purpose for using collaborative technologies and expected outcomes</p> <p>2.3 Identify which collaborative technology tools and devices to use for different communication media</p> <p>2.4 Identify what terms and conditions apply to using collaborative technologies</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Prepare collaborative technologies for use	3.1 Use given details to access collaborative technologies needed for a collaborative task 3.2 Adjust basic settings on collaborative technologies 3.3 Change the environment of collaborative technologies 3.4 Set up and use a data reader to feed information 3.5 Identify what and why permissions are set to allow others to access information			
4 Contribute to tasks using collaborative technologies	4.1 Contribute responsibly and actively to collaborative working 4.2 Contribute to producing and archiving the agreed outcome of collaborative working 4.3 Identify when there is a problem with collaborative technologies and where to get help 4.4 Respond to simple problems with collaborative technologies			

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## Unit 62: Website Software (Level 1)

Unit code:	WS1
Unit reference number:	L/502/4630
QCF level:	1
Credit value:	3
Guided learning hours:	20

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### Unit summary

This is the ability to use a software application designed for planning, designing and building websites.

This unit is about the skills and knowledge required by an IT user to use basic website software tools and techniques appropriately to produce straightforward or routine single web pages from pre-set templates. Any aspect that is unfamiliar will require support and advice from others.

Website software tools and techniques will be described as 'basic' because:

- the software tools and functions involved will be predefined or commonly used;
- the range of inputting, manipulation and outputting techniques are straightforward or routine; and
- the template used for the content will be predetermined or familiar.

### Forbidden combination

This unit cannot be taken with Unit 73: *Website Software (Level 2)* (R/502/4631).

## **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Plan and create web pages	<p>1.1 Identify what content and layout will be needed in the web page</p> <p>1.2 Identify the purpose of the web page and intended audience</p> <p>1.3 Select and use a website design template to create a single web page</p> <p>1.4 Enter or insert content for web page so that it is ready for editing and formatting</p> <p>1.5 Organise and combine information needed for web pages</p> <p>1.6 Identify copyright and other constraints on using others' information</p> <p>1.7 Identify what file types to use for saving content</p> <p>1.8 Store and retrieve web files effectively, in line with local guidelines and conventions where available</p>			
2 Use website software tools to structure and format web pages	<p>2.1 Identify what editing and formatting to use to aid both clarity and navigation</p> <p>2.2 Select and use website features to help the user navigate simple websites</p> <p>2.3 Use appropriate editing and formatting techniques</p> <p>2.4 Check web pages meet needs, using IT tools and making corrections as necessary</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Publish web pages to the Internet or an intranet	3.1 Upload content to a website 3.2 Respond appropriately to common problems when testing a web page			

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## **Unit 63: Word Processing Software (Level 1)**

<b>Unit code:</b>	WPS1
<b>Unit reference number:</b>	L/502/4627
<b>QCF level:</b>	1
<b>Credit value:</b>	3
<b>Guided learning hours:</b>	20

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### **Unit summary**

This is the ability to use a software application designed for the creation, editing and production of largely text-based documents.

This unit is about the skills and knowledge required by an IT user to use a range of basic word processing software tools and techniques to produce appropriate, straightforward or routine documents. Any aspect that is unfamiliar will require support and advice from others.

Word processing tools and techniques will be described as 'basic' because:

- the software tools and functions will be predetermined or commonly used; and
- the techniques needed for text entry, manipulation and outputting will be straightforward or routine.

### **Forbidden combinations**

This unit must not be taken with Unit 74: *Word Processing Software (Level 2)* (R/502/4628).

### **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Enter, edit and combine text and other information accurately within word processing documents</p>	<p>1.1 Identify what types of information are needed in documents</p> <p>1.2 Identify what templates are available and when to use them</p> <p>1.3 Use keyboard or other input method to enter or insert text and other information</p> <p>1.4 Combine information of different types or from different sources into a document</p> <p>1.5 Enter information into existing tables, forms and templates</p> <p>1.6 Use editing tools to amend document content</p> <p>1.7 Store and retrieve document files effectively, in line with local guidelines and conventions where available</p>			
<p>2 Structure information within word processing documents</p>	<p>2.1 Create and modify tables to organise tabular or numeric information</p> <p>2.2 Select and apply heading styles to text</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Use word processing software tools to format and present documents	3.1 Identify what formatting to use to enhance presentation of the document 3.2 Select and use appropriate techniques to format characters and paragraphs 3.3 Select and use appropriate page layout to present and print documents 3.4 Check documents meet needs, using IT tools and making corrections as necessary			

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## Unit 64: **Bespoke Software (Level 2)**

Unit code:	BS2
Unit reference number:	F/502/4396
QCF level:	2
Credit value:	3
Guided learning hours:	20

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### Unit summary

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.

This unit is about the skills and knowledge needed by an IT user to select and use a wide range of intermediate bespoke software tools and techniques for information that is at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.

Bespoke software tools and techniques will be defined as 'intermediate' because:

- the software tools and functions involved will at times be non-routine or unfamiliar;
- the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements and at times be multi-step;
- the user will take some responsibility for inputting, manipulating and outputting the information.

### Forbidden combination

This unit must not be taken with Unit 53: Bespoke Software (A/502/4395).

## **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Input and combine information using bespoke applications	<p>1.1 Input relevant information accurately so that it is ready for processing</p> <p>1.2 Select and use appropriate techniques to link and combine information of different forms or from different sources within the software</p> <p>1.3 Respond appropriately to data entry error messages</p>			
2 Use appropriate structures to organise and retrieve information efficiently	<p>2.1 Describe what functions to apply to structure and layout information effectively</p> <p>2.2 Select and use appropriate structures and/or layouts to organise information</p> <p>2.3 Apply local and/or legal guidelines and conventions for the storage and use of data where available</p>			
3 Use the functions of the software effectively to process and present information	<p>3.1 Select and use appropriate tools and techniques to edit, process and format information</p> <p>3.2 Check information meets needs, using IT tools and making corrections as necessary</p> <p>3.3 Select and use appropriate methods to present information</p>			

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## Unit 65: Data Management Software (Level 2)

Unit code:

Unit reference number: J/502/4559

QCF level: 2

Credit value: 3

Guided learning hours: 20

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### Unit summary

This is the ability to use a software application designed to store and retrieve data needed for a variety of business functions. It also includes an understanding of the features and facilities of the software and the purpose for which the data is stored. Data management software is often implemented on relational database systems by providing predefined file and record structures, processes, reports and data-entry screens. This is about the use of these predefined objects.

This unit is about the skills and knowledge required by an IT user to 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.

### Forbidden combination

This unit must not be taken with Unit 54: *Data Management Software (Level 1)* (F/502/4558).

## **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Enter, edit and maintain data records in a data management system	<p>1.1 Describe the risks to data security and procedures used for data protection</p> <p>1.2 Enter data accurately into groups of records to meet requirements</p> <p>1.3 Locate and amend data associated with groups of records</p> <p>1.4 Check data records meet needs, using IT tools and making corrections as necessary</p> <p>1.5 Respond appropriately to data entry and other error messages</p> <p>1.6 Apply local and/or legal guidelines for the storage and use of data where available</p>			
2 Retrieve and display data records to meet requirements	<p>2.1 Identify what queries and reports need to be run to output the required information</p> <p>2.2 Select and use queries to search for and retrieve information to meet given requirements</p> <p>2.3 Create and view reports to output information from the system to meet given requirements</p>			

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## **Unit 66: Database Software (Level 2)**

<b>Unit code:</b>	DS1
<b>Unit reference number:</b>	M/502/4555
<b>QCF level:</b>	2
<b>Credit value:</b>	4
<b>Guided learning hours:</b>	30

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### **Unit summary**

This is the ability to use a software application designed to organise and store structured information and generate reports.

This unit is about the skills and knowledge required by an IT user to 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.

They will also be able to create and modify single table, non-relational databases. Any aspects that are unfamiliar may require support and advice from others.

Database 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.

### **Forbidden combination**

This unit cannot be taken with Unit 55: *Database Software (Level 1)* (H/502/4553).

## **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Create and modify non-relational database tables	<p>1.1 Identify the components of a database design</p> <p>1.2 Describe the field characteristics for the data required</p> <p>1.3 Create and modify database tables using a range of field types</p> <p>1.4 Describe ways to maintain data integrity</p> <p>1.5 Respond appropriately to problems with database tables</p> <p>1.6 Use database tools and techniques to ensure data integrity is maintained</p>			
2 Enter, edit and organise structured information in a database	<p>2.1 Create forms to enter, edit and organise data in a database</p> <p>2.2 Select and use appropriate tools and techniques to format data entry forms</p> <p>2.3 Check data entry meets needs, using IT tools and making corrections as necessary</p> <p>2.4 Respond appropriately to data entry errors</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Use database software tools to run queries and produce reports	3.1 Create and run database queries using multiple criteria to display or amend selected data 3.2 Plan and produce database reports from a single table non-relational database 3.3 Select and use appropriate tools and techniques to format database reports 3.4 Check reports meet needs, using IT tools and making corrections as necessary			

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## Unit 67: Improving Productivity Using IT (Level 2)

Unit code:	IPU2
Unit reference number:	J/502/4156
QCF level:	2
Credit value:	4
Guided learning hours:	30

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### Unit summary

The use of IT tools and systems can improve the productivity and efficiency of work activities in a variety of contexts.

This unit is about the skills and knowledge needed by the IT user to plan and review their 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, they will be able to identify and use automated methods or alternative ways of working to improve productivity.

An activity will typically be 'non-routine or unfamiliar' because:

- the task or context is likely to require some preparation, clarification or research (to separate the components and to identify what factors need to be considered, for example, time available, audience needs, accessibility of source, types of content, message and meaning) before an approach can be planned; and
- the techniques required will involve a number of steps and at times be non-routine or unfamiliar.

### Forbidden combination

This unit must not be taken with Unit 56: *Improving Productivity using IT (Level 1)* (T/502/4153).

## **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Plan, select and use appropriate IT systems and software for different purposes	<p>1.1 Describe the purpose for using IT</p> <p>1.2 Describe the methods, skills and resources required to complete the task successfully</p> <p>1.3 Plan how to carry out tasks using IT to achieve the required purpose and outcome</p> <p>1.4 Describe any factors that may affect the task</p> <p>1.5 Select and use IT systems and software applications to complete planned tasks and produce effective outcomes</p> <p>1.6 Describe how the purpose and outcomes have been met by the chosen IT systems and software applications</p> <p>1.7 Describe any legal or local guidelines or constraints that may apply to the task or activity</p>			
2 Review and adapt the ongoing use of IT tools and systems to make sure that activities are successful	<p>2.1 Review ongoing use of IT tools and techniques and change the approach as needed</p> <p>2.2 Describe whether the IT tools selected were appropriate for the task and purpose</p> <p>2.3 Assess strengths and weaknesses of final work</p> <p>2.4 Describe ways to make further improvements to work</p> <p>2.5 Review outcomes to make sure they match requirements and are fit for purpose</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Develop and test solutions to improve the ongoing use of IT tools and systems</p>	<p>3.1 Review the benefits and drawbacks of IT tools and systems used, in terms of productivity and efficiency</p> <p>3.2 Describe ways to improve productivity and efficiency</p> <p>3.3 Develop solutions to improve own productivity in using IT</p> <p>3.4 Test solutions to ensure that they work as intended</p>			

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## **Unit 68: IT Security for Users (Level 2)**

<b>Unit code:</b>	ITS2
<b>Unit reference number:</b>	Y/502/4257
<b>QCF level:</b>	2
<b>Credit value:</b>	2
<b>Guided learning hours:</b>	15

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### **Unit summary**

This is the ability to protect hardware, software and the data within an IT system against theft, malfunction and unauthorised access.

This unit is about the skills and knowledge needed by the IT user to 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).

### **Forbidden Combination**

This unit must not be taken with Unit 57: *IT Security for Users (Level 1)* (R/502/4256).

### **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Select and use appropriate methods to minimise security risk to IT systems and data</p>	<p>1.1 Describe the security issues that may threaten system performance</p> <p>1.2 Apply a range of security precautions to protect IT systems and data</p> <p>1.3 Describe the threats to system and information security and integrity</p> <p>1.4 Keep information secure and manage personal access to information sources securely</p> <p>1.5 Describe ways to protect hardware, software and data and minimise security risk</p> <p>1.6 Apply guidelines and procedures for the secure use of IT</p> <p>1.7 Describe why it is important to backup data and how to do so securely</p> <p>1.8 Select and use effective backup procedures for systems and data</p>			

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## **Unit 69: Presentation Software (Level 2)**

<b>Unit code:</b>	PS2
<b>Unit reference number:</b>	M/502/4622
<b>QCF level:</b>	2
<b>Credit value:</b>	4
<b>Guided learning hours:</b>	30

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### **Unit summary**

This is the ability to use software applications to produce effective presentations, which include a combination of media (eg images, animation and sound) for education, entertainment or information sharing.

This unit is about the skills and knowledge required by an IT user to 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.

Presentation tools and techniques at this level will be described as 'intermediate' because:

- the software tools and functions used will be at times non-routine or unfamiliar;
- the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements; and
- the user will take some responsibility for inputting, structuring, editing and presenting the information, which at times may be non-routine or unfamiliar.

### **Forbidden combinations**

This unit must not be taken with Unit 58: *Presentation Software (Level 1)* (K/502/4621).

## **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

The Assessment Strategy for IT Users (ITQ) units can be accessed via eskills UK's website: [www.e-skills.com](http://www.e-skills.com).

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Input and combine text and other information within presentation slides	1.1 Identify what types of information are required for the presentation 1.2 Enter text and other information using layouts appropriate to type of information 1.3 Insert charts and tables into presentation slides 1.4 Insert images, video or sound to enhance the presentation 1.5 Identify any constraints which may affect the presentation 1.6 Organise and combine information of different forms or from different sources for presentations 1.7 Store and retrieve presentation files effectively, in line with local guidelines and conventions where available			
2 Use presentation software tools to structure, edit and format slide sequences	2.1 Identify what slide structure and themes to use 2.2 Select, change and use appropriate templates for slides 2.3 Select and use appropriate techniques to edit slides and presentations to meet needs 2.4 Select and use appropriate techniques to format slides and presentations			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.5 Identify what presentation effects to use to enhance the presentation 2.6 Select and use animation and transition effects appropriately to enhance slide sequences			
3 Prepare slideshow for presentation	3.1 Describe how to present slides to meet needs and communicate effectively 3.2 Prepare slideshow for presentation 3.3 Check presentation meets needs, using IT tools and making corrections as necessary 3.4 Identify and respond to any quality problems with presentations to ensure that presentations meet needs			

Learner name: \_\_\_\_\_ Date: \_\_\_\_\_  
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 Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_  
 (if sampled)

## **Unit 70: Set up an IT System (Level 2)**

<b>Unit code:</b>	SIS2
<b>Unit reference number:</b>	L/502/4210
<b>QCF level:</b>	2
<b>Credit value:</b>	4
<b>Guided learning hours:</b>	30

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### **Unit summary**

This is the ability to safely set up the components of an IT system (eg personal computer - PC, keyboard, mouse and printer), removable storage media (eg data stick or external DVD drive), communication service to access the Internet and associated software and check that they are working properly.

This unit is about the skills and knowledge to 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.

### **Forbidden combination**

This unit must not be taken with Unit 59: *Set up an IT System (Level 1)* (L/502/4210).

### **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Select and connect up a personal computer safely with associated hardware and storage media to meet needs	<p>1.1 Describe what IT system components, storage and peripheral devices are needed</p> <p>1.2 Describe any health and safety issues associated with setting up an IT system</p> <p>1.3 Describe the characteristics of IT systems that affect performance</p> <p>1.4 Select and connect up the components of an IT system safely, including any peripheral devices and storage media</p>			
2 Select and connect an IT system to a communication service to meet needs	<p>2.1 Select and connect communication hardware safely to an IT system</p> <p>2.2 Describe the factors that affect data transfer</p> <p>2.3 Select and connect to a communication service from an IT system</p> <p>2.4 Identify the login and password details needed to connect to an Internet Service Provider (ISP)</p>			
3 Install and configure software for use	<p>3.1 Configure the user interface to meet needs</p> <p>3.2 Describe what security precautions need to be addressed</p> <p>3.3 Set up and configure virus protection software</p> <p>3.4 Install and set up application software to meet needs</p> <p>3.5 Backup and restore system and data files</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Check that the IT system and communication service are working successfully</p>	<p>4.1 Identify what tests can be used to check the IT system and communications</p> <p>4.2 Select and run suitable tests to make sure that the system and communication service are working successfully</p> <p>4.3 Identify the help and troubleshooting facilities available to solve problems</p> <p>4.4 Respond to faults and error messages and use help and troubleshooting facilities to determine and take appropriate action</p>			

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(if sampled)



## **Unit 71: Spreadsheet Software (Level 2)**

<b>Unit code:</b>	SS2
<b>Unit reference number:</b>	F/502/4625
<b>QCF level:</b>	2
<b>Credit value:</b>	4
<b>Guided learning hours:</b>	30

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### **Unit summary**

This is the ability to use a software application designed to record data in rows and columns, perform calculations with numerical data and present information using charts and graphs.

This level is about the skills and knowledge required by an IT user to 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.

Spreadsheet software tools and techniques will be described as 'intermediate' because:

- the range of data entry, manipulation and outputting techniques will be at times non-routine or unfamiliar;
- the tools, formulas and functions needed to analyse and interpret the data requires knowledge and understanding (for example, mathematical, logical, statistical or financial); and
- the user will take some responsibility for setting up or developing the structure and functionality of the spreadsheet.

### **Forbidden combination**

This unit must not be taken with Unit 60: *Spreadsheet Software (Level 1)* (A/502/4624).

## **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Use a spreadsheet to enter, edit and organise numerical and other data	<p>1.1 Identify what numerical and other information is needed in the spreadsheet and how it should be structured</p> <p>1.2 Enter and edit numerical and other data accurately</p> <p>1.3 Combine and link data across worksheets</p> <p>1.4 Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available</p>			
2 Select and use appropriate formulas and data analysis tools to meet requirements	<p>2.1 Identify which tools and techniques to use to analyse and manipulate data to meet requirements</p> <p>2.2 Select and use a range of appropriate functions and formulas to meet calculation requirements</p> <p>2.3 Use a range of tools and techniques to analyse and manipulate data to meet requirements</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Select and use tools and techniques to present and format spreadsheet information</p>	<p>3.1 Plan how to present and format spreadsheet information effectively to meet needs</p> <p>3.2 Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets</p> <p>3.3 Select and format an appropriate chart or graph type to display selected information</p> <p>3.4 Select and use appropriate page layout to present and print spreadsheet information</p> <p>3.5 Check information meets needs, using spreadsheet tools and making corrections as necessary</p> <p>3.6 Describe how to find errors in spreadsheet formulas</p> <p>3.7 Respond appropriately to any problems with spreadsheets</p>			

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(if sampled)

## Unit 72: Using Collaborative Technologies (Level 2)

Unit code:	UCT2
Unit reference number:	F/502/4379
QCF level:	2
Credit value:	4
Guided learning hours:	30

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### Unit summary

This is the ability to use IT tools and devices for collaborative working and communications, such as web or video conferencing, instant messaging/chat, online phone and video calls, online forums, social networking sites, wikis and other centralised depositories for documents, blogging, RSS and data feeds, bulk SMS or online work management tools.

This unit is about the skills and knowledge to facilitate the use of appropriate combinations of IT tools 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.

### Forbidden combinations

This unit must not be taken with Unit 61: *Using Collaborative Technologies (Level 1)* (A/502/4378).

## **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Stay safe and secure when working with collaborative technology	<p>1.1 Take appropriate steps to avoid risks when working with collaborative technology, in line with relevant guidelines</p> <p>1.2 Explain what risks there may be in using collaborative technology and how to keep them to a minimum</p> <p>1.3 Use appropriate methods to promote trust when working collaboratively</p> <p>1.4 Carry out appropriate checks on others' online identities and different types of information</p> <p>1.5 Identify and respond to inappropriate content and behaviour</p>			
2 Plan and set up IT tools and devices for collaborative working	<p>2.1 Describe the purposes for using collaborative technologies</p> <p>2.2 Describe what outcomes are needed from collaborative working and whether or not archiving is required</p> <p>2.3 Describe the roles, IT tools and facilities needed for collaborative tasks and communication media</p> <p>2.4 Describe the features, benefits and limitations of different collaborative technology tools and devices</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3	Prepare collaborative technologies for use			
	2.5 Describe the compatibility issues in different combinations of collaborative tools and devices 2.6 Select an appropriate combination of IT tools and devices to carry out collaborative tasks 2.7 Connect and configure the combination of IT tools and devices needed for a collaborative task 3.1 Describe what access rights and issues others may have in using collaborative technologies 3.2 Assess what permissions are needed for different users and content 3.3 Set up and use access rights to enable others to access information 3.4 Set up and use permissions to filter information 3.5 Adjust settings so that others can access IT tools and devices for collaborative working 3.6 Select and use different elements to control environments for collaborative technologies 3.7 Select and join networks and data feeds to manage data to suit collaborative tasks			



Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Contribute to tasks using collaborative technologies	4.1 Describe rules of engagement for using collaborative technologies 4.2 Enable others to contribute responsibly to collaborative tasks 4.3 Present relevant and valuable information 4.4 Moderate the use of collaborative technologies 4.5 Archive the outcome of collaborative working 4.6 Assess when there is a problem with collaborative technologies and when to get expert help 4.7 Respond to problems with collaborative technologies			

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 (if sampled)



## **Unit 73: Website Software (Level 2)**

<b>Unit code:</b>	WS2
<b>Unit reference number:</b>	R/502/4631
<b>QCF level:</b>	2
<b>Credit value:</b>	4
<b>Guided learning hours:</b>	30

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### **Unit summary**

This is the ability to use a software application designed for planning, designing and building websites.

This unit is about the skills and knowledge required by an IT user to 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.

Website software tools and techniques will be described as 'intermediate' because:

- the software tools and functions involved will at times be non-routine or unfamiliar;
- the choice and use of development techniques will need to take account of a number of factors or elements; and
- the user will take some responsibility for planning the website, creating or altering the template, inputting, manipulating, linking and uploading the content.

### **Forbidden combinations**

This unit must not be taken with Unit 62: *Website Software (Level 1)* (L/502/4630).

## **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Create structures and styles for websites	<p>1.1 Describe what website content and layout will be needed for each page</p> <p>1.2 Plan and create web page templates to layout</p> <p>1.3 Select and use website features and structures to help the user navigate round web pages within the site</p> <p>1.4 Create, select and use styles to keep the appearance of web pages consistent and make them easy to understand</p> <p>1.5 Describe how copyright and other constraints may affect the website</p> <p>1.6 Describe what access issues may need to be taken into account</p> <p>1.7 Describe what file types to use for saving content</p> <p>1.8 Store and retrieve files effectively, in line with local guidelines and conventions where available</p>			
2 Use website software tools to prepare content for websites	<p>2.1 Prepare content for web pages so that it is ready for editing and formatting</p> <p>2.2 Organise and combine information needed for web pages including across different software</p> <p>2.3 Select and use appropriate editing and formatting techniques to aid both clarity and navigation</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	2.4 Select and use appropriate development techniques to link information across pages 2.5 Change the file formats appropriately for content 2.6 Check web pages meet needs, using IT tools and making corrections as necessary			
3 Publish websites	3.1 Select and use appropriate testing methods to check that all elements of websites are working as planned 3.2 Identify any quality problems with websites and how to respond to them 3.3 Select and use an appropriate program to upload and publish the website 3.4 Respond appropriately to problems with multiple page websites			

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*(if sampled)*

## **Unit 74: Word Processing Software (Level 2)**

<b>Unit code:</b>	WP2
<b>Unit reference number:</b>	R/502/4628
<b>QCF level:</b>	2
<b>Credit value:</b>	4
<b>Guided learning hours:</b>	30

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### **Unit summary**

This is the ability to use a software application designed for the creation, editing and production of largely text-based documents.

This unit is about the skills and knowledge required by an IT user to 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.

Word processing tools and techniques will be described as 'intermediate' because:

- the software tools and functions will be at times non-routine or unfamiliar;
- the choice of techniques will need to take account of a number of factors or elements; and
- the user will take some responsibility for the inputting, manipulating and outputting of the information.

### **Forbidden combinations**

This unit must not be taken with Unit 63: *Word Processing Software (Level 2)* (L/502/4627).

## **Assessment guidance**

The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users (ITQ) units:

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by eskills UK and the awarding body.

The Assessment Strategy for IT Users (ITQ) units can be accessed via Eskills UK's website: [www.e-skills.com](http://www.e-skills.com).

## **Assessment methodology**

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.



## Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Enter and combine text and other information accurately within word processing documents	<p>1.1 Identify what types of information are needed in documents</p> <p>1.2 Use appropriate techniques to enter text and other information accurately and efficiently</p> <p>1.3 Select and use appropriate templates for different purposes</p> <p>1.4 Identify when and how to combine and merge information from other software or other documents</p> <p>1.5 Select and use a range of editing tools to amend document content</p> <p>1.6 Combine or merge information within a document from a range of sources</p> <p>1.7 Store and retrieve document and template files effectively, in line with local guidelines and conventions where available</p>			
2 Create and modify layout and structures for word processing documents	<p>2.1 Identify the document requirements for structure and style</p> <p>2.2 Identify what templates and styles are available and when to use them</p> <p>2.3 Create and modify columns, tables and forms to organise information</p> <p>2.4 Select and apply styles to text</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Use word processing software tools to format and present documents effectively to meet requirements</p>	<p>3.1 Identify how the document should be formatted to aid meaning</p> <p>3.2 Select and use appropriate techniques to format characters and paragraphs</p> <p>3.3 Select and use appropriate page and section layouts to present and print documents</p> <p>3.4 Describe any quality problems with documents</p> <p>3.5 Check documents meet needs, using IT tools and making corrections as necessary</p> <p>3.6 Respond appropriately to quality problems with documents so that outcomes meet needs</p>			

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(if sampled)

## Further information

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Our customer service numbers are:

BTEC and NVQ	0844 576 0026
GCSE	0844 576 0027
GCE	0844 576 0025
The Diploma	0844 576 0028
DIDA and other qualifications	0844 576 0031

Calls may be recorded for training purposes.

## Useful publications

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Related information and publications include:

- *Centre Handbook for Edexcel QCF NVQs and Competence-based Qualifications* published annually
- functional skills publications – specifications, tutor support materials and question papers
- *Regulatory Arrangements for the Qualification and Credit Framework* (published by Ofqual, August 2008)
- the current Edexcel publications catalogue and update catalogue.

Edexcel publications concerning the Quality Assurance System and the internal and standards verification of vocationally related programmes can be found on the Edexcel website.

NB: Some of our publications are priced. There is also a charge for postage and packing. Please check the cost when you order.

## How to obtain National Occupational Standards

The Council for Administration  
6 Graphite Square  
Vauxhall Walk  
London  
SE11 5EE

Telephone: 020 7091 9620  
Email: [info@cfa.uk.com](mailto:info@cfa.uk.com)

## Professional development and training

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Edexcel supports UK and international customers with training related to NVQ and BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing student-centred learning and teaching approaches
- building functional skills into your programme
- building effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on our website ([www.edexcel.com/training](http://www.edexcel.com/training)). You can request customised training through the website or by contacting one of our advisers in the Training from Edexcel team via Customer Services to discuss your training needs.

The training we provide:

- is active
- is designed to be supportive and thought provoking
- builds on best practice
- may be suitable for those seeking evidence for their continuing professional development.

## Annexe A: Progression pathways

The Edexcel qualification framework for the Business and Administration and Team Leading and Management sectors

Level	General qualifications	Diplomas	BTEC vocationally-related qualifications	BTEC specialist qualification/professional	NVQ/competence
8					
7				BTEC Level 7 Award/Certificate/Diploma in Strategic Management and Leadership (QCF)	BTEC Level 7 NVQ Diploma in Management (QCF)
6					
5				BTEC Level 5 Award/Certificate/Diploma in Management and Leadership (QCF)	BTEC Level 5 NVQ Diploma in Management (QCF)
4					Level 4 NVQ Certificate in Business and Administration (QCF) Level 4 NVQ Diploma in Business and Administration (QCF)

Level	General qualifications	Diplomas	BTEC vocationally-related qualifications	BTEC specialist qualification/professional	NVQ/competence
3	GCE in Business Studies GCE in Economics and Business Studies	Level 3 Higher Diploma in Business, Administration and Finance	BTEC Level 3 Subsidiary Diploma/Diploma/Extended Diploma in Business	BTEC Level 3 Award in Principles of Business and Administration (QCF) BTEC Level 3 Certificate in Principles of Business and Administration (QCF) BTEC Level 3 Award/Certificate in Management (QCF)	Level 3 NVQ Certificate in Business and Administration (QCF) Level 3 NVQ Diploma in Business and Administration (QCF) BTEC Level 3 NVQ Certificate in Management (QCF)
2	GCSE in Applied Business GCSE in Business Studies GCSE in Business Communications GCSE in Business Studies and Economics	Level 2 Advanced Diploma in Business, Administration and Finance	BTEC Level 2 Certificate/Extended Certificate/Diploma in Business	BTEC Level 2 Award in Principles of Business and Administration (QCF) BTEC Level 2 Certificate in Principles of Business and Administration (QCF) Level 2 BTEC Award and Certificate in Team Leading (QCF)	Level 2 NVQ Award in Business and Administration (QCF) Level 2 NVQ Certificate in Business and Administration (QCF) Level 2 NVQ Diploma in Business and Administration (QCF) Level 2 NVQ Certificate in Team Leading (QCF)

<b>Level</b>	<b>General qualifications</b>	<b>Diplomas</b>	<b>BTEC vocationally-related qualifications</b>	<b>BTEC specialist qualification/professional</b>	<b>NVQ/competence</b>
<b>1</b>		Level 1 Foundation Diploma in Business, Administration and Finance	BTEC Level 1 Award/Certificate/Diploma in Business Administration (QCF)		Level 1 NVQ Award in Business and Administration (QCF) Level 1 NVQ Certificate in Business and Administration (QCF)
<b>Entry</b>			BTEC Entry Level Award in Business Administration (Entry 3) (QCF)		





## Annexe B: Quality assurance

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### Key principles of quality assurance

- A centre delivering Edexcel qualifications must be an Edexcel recognised centre and must have approval for qualifications that it is offering.
- The centre agrees as part of gaining recognition to abide by specific terms and conditions around the effective delivery and quality assurance of assessment; the centre must abide by these conditions throughout the period of delivery.
- Edexcel makes available to approved centres a range of materials and opportunities to exemplify the processes required for effective assessment and provide examples of effective standards. Approved centres must use the guidance on assessment to ensure that staff who are delivering Edexcel qualifications are applying consistent standards.
- An approved centre must follow agreed protocols for: standardisation of assessors; planning, monitoring and recording of assessment processes; internal verification and recording of internal verification processes; and for dealing with special circumstances, appeals and malpractice.

### Quality assurance processes

The approach to quality assured assessment is made through a partnership between a recognised centre and Edexcel. Edexcel is committed to ensuring that it follows best practice and employs appropriate technology to support quality assurance processes where practicable. Therefore, the specific arrangements for working with centres will vary. Edexcel seeks to ensure that the quality assurance processes that it uses do not place undue bureaucratic processes on centres and works to support centres in providing robust quality assurance processes.

The learning outcomes and assessment criteria in each unit within this specification set out the standard to be achieved by each learner in order to gain each qualification. Edexcel operates a quality assurance process, which is designed to ensure that these standards are maintained by all assessors and verifiers.

For the purposes of quality assurance all individual qualifications and units are considered as a whole. Centres offering these qualifications must be committed to ensuring the quality of the units and qualifications they offer, through effective standardisation of assessors and internal verification of assessor decisions. Centre quality assurance and assessment processes are monitored by Edexcel.

The Edexcel quality assurance processes will involve:

- gaining centre recognition and qualification approval if a centre is not currently approved to offer Edexcel qualifications
- annual visits to centres by Edexcel for quality review and development of overarching processes and quality standards. Quality review and development visits will be conducted by an Edexcel quality development reviewer
- annual visits by occupationally competent and qualified Edexcel Standards Verifiers for sampling of internal verification and assessor decisions for the occupational sector
- the provision of support, advice and guidance towards the achievement of National Occupational Standards.

Centres are required to declare their commitment to ensuring quality and appropriate opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

## Annexe C: Centre certification and registration

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Edexcel Standards Verifiers will provide support, advice and guidance to centres to achieve Direct Claims Status (DCS). Edexcel will maintain the integrity of Edexcel QCF NVQs through ensuring that the awarding of these qualifications is secure. Where there are quality issues identified in the delivery of programmes, Edexcel will exercise the right to:

- direct centres to take actions
- limit or suspend certification
- suspend registration.

The approach of Edexcel in such circumstances is to work with the centre to overcome the problems identified. If additional training is required, Edexcel will aim to secure the appropriate expertise to provide this.

### **What are the access arrangements and special considerations for the qualifications in this specification?**

Centres are required to recruit learners to Edexcel qualifications with integrity.

Appropriate steps should be taken to assess each applicant's potential and a professional judgement made about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Edexcel's policy on learners with particular requirements.

Edexcel's policy on access arrangements and special considerations for Edexcel qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the 1995 Disability Discrimination Act and the amendments to the Act) without compromising the assessment of skills, knowledge, understanding or competence. Please refer to *Access Arrangements and Special Considerations for BTEC and Edexcel NVQ Qualifications* for further details. [www.edexcel.com](http://www.edexcel.com).



# Annexe D: Assessment strategies

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## Assessment Strategy for Business and Administration NVQs

### 1 Introduction

- 1.1 The Business and Administration Assessment Strategy is designed to provide awarding organisations with a robust and flexible approach to deliver assessment for Business and Administration NVQs/SVQs and competence-based qualifications.

### 2 External quality control

- 2.1 Awarding organisations will provide qualifications and quality assurance that support their delivery to all Business and Administration NVQs/SVQs and competence-based qualification assessment centres in line with regulatory requirements in England, Scotland, Wales and Northern Ireland.
- 2.2 Awarding organisations must use independent assessment for competence-based qualifications.
- 2.3 Awarding organisations will supply the Council for Administration (CfA) with reports:
- Quarterly: provide registration and achievement data at unit and qualification levels.

### 3 Assessing performance

- 3.1 Assessment of all units at any level of Business and Administration NVQs/SVQs and competence-based qualifications may be based on either learner performance at work or through simulation, as necessary (see Section 4 below).

### 4 Simulation of NVQ/SVQ units

- 4.1 If a unit or part of a unit at any level is simulated, it must be undertaken in a 'realistic working environment' (RWE).
- 4.2 Awarding organisations will provide guidance for centres on RWEs. Awarding organisations will make sure RWEs, 'provide an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed'.
- 4.3 Units which have been imported by the CfA in their Business and Administration NVQs/SVQs and competence-based qualifications will be assessed in compliance with their relevant assessment strategies.

## 5 Occupational expertise to assess performance, and moderate and verify assessments

- 5.1 Learners can be assessed, moderated or verified at work either by:
- a. **Assessors, moderators** or **verifiers** who have achieved or are working towards achievement of the appropriate regulatory body approved unit qualifications for assessment, moderation or verification;

OR

- b. A **trainer, supervisor** or **manager**, employed by an organisation, who must either:
    1. Have achieved or be in the process of achieving the appropriate regulatory body approved unit qualifications for assessment, moderation or verification; or,
    2. Seek guidance and approval from an awarding organisation to demonstrate that the:
      - organisation has appropriate processes in place to facilitate assessment, moderation or verification functions
      - trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the NOS upon which the qualifications above are based.
- 5.2 **Assessors** must be occupationally competent to make Business and Administration assessment judgements about the level and scope of individual learner performance at work or in RWEs; and, occupationally competent to make assessment judgements about the quality of assessment and the assessment process.
- 5.3 **External Moderators/Verifiers or Internal Moderators/Verifiers** must be occupationally competent to make Business and Administration moderation and verification judgements about the quality of assessment and the assessment process.
- 5.4 Awarding organisations will supply full information on the requirements for internal and external moderation/verification activities to Business & Administration assessment centres.
- 5.5 The sector requires all assessors, moderators and verifiers to maintain current Business and Administration competence to deliver these functions. The CfA recognises this can be achieved in many ways but must be recorded in individual continual professional development (CPD) records that are maintained in Business and Administration assessment centres.

## **Assessment Strategy for Information Technology Qualifications (ITQ) May 2009**

The following includes excerpts from the assessment strategy for Information Technology qualifications (ITQ). The complete assessment strategy can be viewed on eskills UK's website: [www.e-skills.com](http://www.e-skills.com)

The following assessment strategy relates to the following units:

- A/502/4395 Bespoke software
- F/502/4558 Data management software
- H/502/4553 Database software
- T/502/4153 Improving productivity using IT
- R/502/4256 IT security for users
- K/502/4621 Presentation software
- Y/502/4209 Set up an IT system
- A/502/4624 Spreadsheet software
- A/502/4378 Using collaborative technologies
- L/502/4630 Website software
- L/502/4627 Word processing software
- F/502/4396 Bespoke software
- J/502/4559 Data management software
- M/502/4555 Database software
- J/502/4156 Improving productivity using IT
- Y/502/4257 IT security for users
- M/502/4622 Presentation software
- L/502/4210 Set up an IT system
- F/502/4625 Spreadsheet software
- F/502/4379 Using collaborative technologies
- R/502/4631 Website software
- R/502/4628 Word processing software.

This assessment strategy is being developed in consultation with employers, training providers, Awarding Bodies and the regulatory authorities.

## Scope of the assessment strategy

This assessment strategy applies to all units and qualifications that are aligned to the IT User NOS and accredited onto credit frameworks to be included in the final ITQ Framework (both directly and partly signed).

During the transition period, the assessment arrangements for existing 'contributing' units and NQF qualifications will apply.

## Choice of assessment method

All ITQ units may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met. Assessments must also take into account the additional information provided in the unit Purpose and Aims relating to the level of demand of:

- The activity, task, problem or question and the context in which it is set
- The information input and output type and structure involved; and
- The IT tools, techniques or functions to be used.

Examples of recommended assessment methods are included in *Annexe A*.

## Accreditation of Prior Achievement

For learners starting their studies towards the ITQ under the QCF the process for accreditation of prior achievement is straightforward. Under the QCF, Awarding Bodies agree to mutual recognition of achievement, so that learners will be able to count any relevant units towards the ITQ regardless of which Awarding Body issues the certificates.

Many people may have developed their skills in using IT through undertaking existing or 'legacy' accredited units, qualifications or from non-accredited units and employer training schemes, such as:

- The QCF ITQ in trials between September 07 and August 09
- The current ITQ which is technically a National Vocational Qualification (NVQ)
- Functional Skills ICT, ICT Skills for Life (Basic Skills) and in Essential Skills ICT (Northern Ireland)
- Legacy units from VQs or VRQs accredited on the National Qualifications Framework (NQF) or accredited by the Scottish Qualifications Authority (SQA)
- Vendor units and qualifications and
- Employer training schemes.

The ITQ Framework lists which units or schemes can contribute to the ITQ, and whether there are any limits on counting credit from such achievement. The up-to-date ITQ Framework will be published on the e-skills UK website.



Acceptance of contributing qualifications is mandatory for all ITQ Awarding Bodies irrespective of the originating Awarding Body (AB). An Awarding Body offering ITQs must accept recognised units and qualifications from any other AB if the following conditions are met:

- The learner presents the original qualification, unit certificate or other agreed record of achievement for inspection by the ITQ centre; and
- The unit was achieved no more than three years prior to the date of presentation to the centre. It is the responsibility of the AB and their centres to ensure that a representative sample of certificated skills and knowledge are still current.
- Some approved contributing units entitle learners to claim exemptions for more than one ITQ unit. In such cases, the learner does not have to claim exemptions for all of the possible ITQ units unless he/she chooses to do so.

## **Progression**

Learners may carry forward credits for a period of three years to support progression from ITQ Award to ITQ Certificate and from ITQ Certificate to ITQ Diploma or from Level 1 to 2, or Level 2 to 3.

Learners may not include the same unit at more than one level in any qualification. Thus a learner who has completed, for example, both Word Processing at Level 1 (3 credits) and Word Processing at Level 2 (4 credits) may only count credits from the higher level towards the qualification.

## Assessment Roles and Quality Assurance

### Assessors, internal and external moderators/verifiers

The new ITQs are not NVQs, therefore there is no need for assessors to hold the A1 qualification or for verifiers to hold the V1 qualification, or indeed to be working towards these qualifications.

To ensure the quality of assessment decisions, it is expected that awarding bodies will have in place methods to ensure that assessors, internal and external moderators/verifiers have:

- the necessary IT skills and experience to assess the units and qualifications they are making judgements on, such as demonstrated by holding an ITQ at level 3. Centres must maintain a current register of curriculum vitae (CVs), including reference to continuing professional development.

Eskills UK do not require assessors, internal or external moderators/verifiers to hold assessor qualifications beyond those required by the awarding or regulatory body.

### Standardisation, moderation and verification

Awarding Bodies must use quality assurance systems that are fit for purpose for the assessment method(s) being used and are in line with the relevant regulatory requirements.

For example:

- Internal/external moderation of externally set examinations or online tests
- External moderation of externally set and internally marked texts
- Records to authenticate learner's evidence for assessment
- Internal standardisation/external moderation of scenario-based assignments set by centres
- Internal moderation/verification of internally assessed evidence by a suitably qualified internal moderator/verifier using procedures approved by the awarding body; and
- External moderation/verification of internally assessed evidence by a suitably qualified external moderator/verifier using procedures specified by the awarding body.

## **Joint Awarding Body Forum**

Awarding Bodies, through the quality control mechanisms specified by the regulatory authorities, must ensure a rigorous and effective control of centres and the assessment and verification process so that judgement of what is valid, authentic, current, reliable and sufficient evidence is maintained across all assessment contexts.

To ensure consistency of assessment it is required that all Awarding Bodies routinely participate in the e-skills UK Joint Awarding Body Forum which will be the focus for ensuring that assessment and verification of competence is carried out consistently and fairly across all assessment contexts.

The Awarding Body Forum will, within the individual Awarding Bodies' agreed methodologies, develop and maintain a common understanding of the standards and promote good assessment and verification practice.

## **Annexe A to Assessment Strategy for ITQs: Guidance for Awarding Bodies on recommended assessment methods**

The following methods are recommended for the assessment of IT User skills, knowledge and understanding for all ITQ units:

- E-assessment
- Knowledge tests
- Scenario-based assessment
- Portfolio of evidence taken from activities involving the use of contemporary ICT systems
- Witness testimony
- Professional discussion
- Other methods which have been approved by e-skills UK and the Awarding Body.

Whatever method is used, Awarding Bodies must have appropriate systems and procedures to:

- Ensure that assessment arrangements meet relevant assessment design principles and quality assurance regulations; and
- Make sample assessment materials available for discussion by the Joint Awarding Body Forum, as required.

### **e-Assessment**

Online or e-assessment may be used to assess some learning outcomes and assessment criteria relating to performance, knowledge and understanding, for example, of the performance skills in formatting text or understanding of the reasons for choosing different software tools.

Awarding Bodies, employers or providers may develop e-assessments. Where e-assessment is used, Awarding Bodies must ensure that on each assessment occasion:

- The performance, knowledge and understanding being assessed matches that specified in the relevant ITQ unit
- The level is sufficiently challenging; and
- The assessment methodology used is robust and reliable.

Where employers or providers develop e-assessments, these should be agreed in advance with the Awarding Body.

### **Knowledge tests**

Knowledge tests, often delivered electronically, can be used to assess some learning outcomes and assessment criteria relating to knowledge and understanding, for example, knowledge of security risks or organisational guidelines.

Awarding Bodies, employers or providers may develop knowledge tests. Where knowledge tests are used, Awarding Bodies must ensure that on each testing occasion:

- The knowledge being tested matches that specified in the relevant ITQ unit
- The level is sufficiently challenging; and
- The assessment methodology used is robust and reliable.

Where employers or providers develop knowledge tests, these should be agreed in advance with the awarding body.

### **Scenario-based assessment**

'Scenarios' may be developed to provide a purpose for using IT, which requires the learner to undertake practical tasks or activities that produce assessable outcomes. Scenarios may be combined with other methods of assessment, for example, to provide a purpose for a series of online assessment tasks.

Awarding Bodies, employers or providers may develop scenarios. The scenario and associated tasks must be carefully designed to ensure that:

- The performance, knowledge and understanding being assessed matches that specified in the relevant ITQ unit
- The level is sufficiently challenging; and
- The demands and constraints result in the purposeful use of IT, and where relevant reflect those that would typically be met in a real work context.

### **Portfolio assessment**

Valid evidence can arise from:

- Activities undertaken for or at work
- The search for employment (eg CVs, job application and emails to potential employers)
- Social activities (eg club membership databases, posters and websites), such as
  - Enterprise activities (eg business plans, budgets and marketing materials)
  - Voluntary activities (eg cash flows, programmes and newsletters);or
  - Learning and studying subjects other than IT (eg internet research for a geography assignment, reports/dissertations and presentations).

By the very nature of IT, activities can be carried out in a variety of locations not confined to the traditional office setting.

Portfolio evidence should arise naturally from tasks and activities involving the use of IT and may include:

- Project outcomes – in the form of outputs or screenshots produced using IT – which should form the majority of evidence; and
- Ephemeral evidence – where this is the only evidence for an element (for example, of planning), it should be cross checked by professional discussion and backed up by brief written evidence – for example in the form of annotations, storyboards or 'witness statement' (see below).

Eskills UK actively encourages the use of electronic portfolio management tools.

## **Witness statements**

A 'witness' is someone who provides a written statement about the quality and authenticity of a learner's work for assessment purposes. To make a statement, the witness must have first-hand experience of the learner's performance and understanding of knowledge, skills and understanding required to do the work. Witnesses can be drawn from a wide range of people who can attest to performance, including line managers and experienced colleagues from inside the learner's organisation.

A witness statement may be needed when the learner is performing day-to-day activities, which leave little or no evidence behind, for example, agreeing the outcomes to be produced using IT and any deadlines that need to be met or understanding and meeting organisational guidelines for data security and file storage. The witness can, in particular, provide evidence relating to the learner's competence:

- when reviewing, testing and recommending ways of improving productivity using IT towards (IPU) the mandatory unit for ITQ Certificates and Diplomas
- when using specialist or bespoke IT software applications
- in meeting customer requirements; and
- of working within organisational guidelines.

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