Specification

Edexcel Level 2 Certificate in Mail Services (QCF)

Edexcel Level 2 Diploma in Mail Services (QCF)

First registration February 2011

Issue 2

edexcel

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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.

Our specialist suite of qualifications include NVQs, Apprenticeships, WorkSkills, Functional Skills, Foundation Learning, as well as our exclusive range of BTECs, from entry level right through to Higher National Diplomas.

This specification is Issue 2. Key changes are sidelined. We will inform centres of any changes to this issue. The latest issue can be found on the Edexcel website: www.edexcel.com

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Contents

Qualification titles covered by this specification

This specification gives you the information you need to offer the Edexcel Level 2 Certificate and Diploma in Mail Services (QCF):

Qualification title	Qualification Number (QN)	Accreditation start date
Edexcel Level 2 Certificate in Mail Services (QCF)	600/0669/9	01/02/2011
Edexcel Level 2 Diploma in Mail Services (QCF)	600/0668/7	01/02/2011

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 Section 96 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 Aim Reference Application (LARA), where relevant.

You should use the QCF Qualifications Number (QN), 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.

The Edexcel Level 2 Certificate in Mail Services (QCF) has been flagged for funding on the LARA.

Key features of the Edexcel Level 2 Certificate and Diploma in Mail Services (QCF)

These qualifications:

- are nationally recognised
- are based on the Mail Services National Occupational Standards (NOS). The NOS assessment requirements/strategy and qualification structure(s) are owned by Skills for Logistics.

What is the purpose of these qualifications?

The Edexcel Level 2 Certificate and Diploma in Mail Services (QCF) gives learners the opportunity to demonstrate their skills and knowledge to the standard of professionalism required by the sector as defined by the Sector Skills Council.

It requires learners to demonstrate competence in handling, collecting, sorting and delivering mail, planning routes and the various processes involved. It also includes wider competences such as health, safety and security and contributing to working relationships.

Who are these qualifications for?

These qualifications are 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 qualification(s).

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

This qualification requires individuals to demonstrate competence against the National Occupation Standards (NOS) which are based on the needs of the mail services industry as defined by the Skills for Logistics, the Sector Skills Council. As such it contributes to the development of skilled labour in the sector.

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

- Mail services operative

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

Learners can progress from the certificate to the diploma, or other suitable Level 3 qualifications, work or training, in the logistics and mail services sector.

What is the qualification structure for the Edexcel Level 2 Certificate in Mail Services (QCF)?

Individual units can be found in the *Units* section.

To achieve this qualification, learners must complete both mandatory units, and select any combination of units from the optional unit group that add to a minimum of 26 credits.

The total minimum credit required to achieve this qualification is 26 credits with a maximum of 34 credits.

Unit	Unit code	Mandatory units	Credit	GLH
1	J/600/6704	Contribute to health, safety and security in mail services	5	28
2	R/600/6706	Contribute to working relationships in mail services	5	21

Unit	Unit code	Optional units	Credit	GLH
3	K/600/6761	Handle mail	5	28
4	M/600/6762	Contribute to the maintenance of equipment used in mail services	4	23
5	T/600/6763	Plan routes to mail destinations	6	28
6	A/600/6764	Transport mail	6	27
7	F/600/6765	Collect mail	5	27
8	J/600/6766	Process mail instructions	4	20
9	Y/600/6769	Separate mail for processing	5	27
10	L/600/6770	Process mail through automated systems	6	30
11	D/600/6773	Sort mail	5	26
12	H/600/6774	Deliver mail	6	28

What is the qualification structure for the Edexcel Level 2 Diploma in Mail Services (QCF)?

Individual units can be found in the Units section.

To achieve this qualification, learners must complete both mandatory units, and select any combination of units from the optional unit group that add to a minimum of 37 credits.

The total minimum credit required to achieve this qualification is 37 credits.

Unit	Unit code	Mandatory units	Credit	GLH
1	J/600/6704	Contribute to health, safety and security in mail services	5	28
2	R/600/6706	Contribute to working relationships in mail services	5	21

Unit	Unit code	Optional Units	Credit	GLH
3	K/600/6761	Handle mail	5	28
4	M/600/6762	Contribute to the maintenance of equipment used in mail services	4	23
5	T/600/6763	Plan routes to mail destinations	6	28
6	A/600/6764	Transport mail	6	27
7	F/600/6765	Collect mail	5	27
8	J/600/6766	Process mail instructions	4	20
9	Y/600/6769	Separate mail for processing	5	27
10	L/600/6770	Process mail through automated systems	6	30
11	D/600/6773	Sort mail	5	26
12	H/600/6774	Deliver mail	6	28

How are these qualifications graded and assessed?

The overall grade for these qualifications 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 guidance

The assessment guidance for these qualifications have been included in *Annexe C*. They have been developed by Skills for Logistics in partnership with employers, training providers, awarding organisations and the regulatory authorities. The assessment guidance includes details on:

- criteria for defining realistic working environments
- roles and occupational competence of assessors, expert witnesses, internal verifiers and standards verifiers
- quality control of assessment
- evidence requirements.

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:

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

Types of evidence (to be read in conjunction with the assessment guidance in Annexe C)

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 examples below. Centres should refer to the assessment strategy for information about which of the following are permissible.

- 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).

The abbreviations may be used for cross-referencing purposes.

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. Alternatively, centres may develop their own.

Centre recognition and approval

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

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

What resources are required?

Each qualification is designed to support learners working in the Mail Services sector. Physical resources need to support the delivery of the qualifications and the assessment of the learning outcomes and must be of industry standard. 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.

Unit title:

> The unit title is approved on the QCF and this form of words will appear on the learner's Notification of Performance (NOP).

Unit code:

> This is the unit owner's reference number for the specified unit.

QCF level:

> 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.

Credit value:

> 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.

Guided learning hours:

> 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.

Unit summary:

> This provides a summary of the purpose of the unit.

Assessment requirements/evidence requirements:

> The assessment/evidence requirements are determined by the SSC. Learners must provide evidence for each of the requirements stated in this section.

Assessment methodology:

> This provides a summary of the assessment methodology to be used for the unit.

Learning outcomes:	Assessment criteria:	Examples of content:	Evidence type:	Portfolio reference:	Date:
		Examples of content are given to illustrate the type of knowledge learners may be expected to use, relevant to their role and employer.		The learner should use this box to indicate where the evidence can be obtained egg 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: Contribute to health, safety and security in mail services

Unit code:	J/600/6704
QCF level:	2
Credit value:	5
Guided learning hours:	28

Unit summary

This unit is an introduction to Health and Safety requirements for the Mail services sector. This unit could be delivered alongside, or after, a company induction programme for new employees.

The learner should be able to identify applicable organisational policies, relevant legislation, protocols, behaviour and equipment appropriate to safe working within the mail services sector.

Assessment methodology

This unit is assessed in the workplace, in conditions resembling the workplace and/or in a formal learning environment as appropriate.

The types of evidence that are presented for assessment and the submission date can be entered against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Please see the assessment information for this qualification and the assessment guidance.

Simulation is allowed for this unit.

Learning outcomes and assessment criteria

LO.1: understand health, safety and security requirements in mail services				
Assessment criteria	**Examples of content**	**Evidence type**	**Portfolio reference**	**Date**
1.1 describe organisational policies and procedures that relate to health, safety and security in mail services	**Organisational Policies** • Health and Safety at Work Act • Personal Protection Equipment • Organisational Accident procedures • Training • Security of employees • Security of mail			
1.2 describe the safety and security risks in relation to mail services	**Safety and security risks** • Use of equipment • Safe storage • Safe handling • Delivery • Theft • Location or site • Risk management			

LO.1: understand health, safety and security requirements in mail services

	Assessment criteria	Examples of content	Evidence type	Portfolio reference	Date
1.3	identify the approved precautions that are in place to minimise safety and security risks	**Approved precautions** • Safety training • Equipment • Communication • Skills • Vigilance • Route planning • Timing			
1.4	describe appropriate personal protection equipment	**Appropriate personal protection** • Headgear/helmets • High visibility, waterproofs • Safety footwear			
1.5	describe actions that can be taken to prevent harm to individuals	**Prevent harm to individuals** • Defensive behaviour • Vigilance • Assertiveness • Compliance with role protocols and route			

LO.1: understand health, safety and security requirements in mail services

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.6	describe actions that can be taken in response to accidents and emergencies	**Accidents and emergencies** • Contact points and numbers • First aid • Police, fire, ambulance • Panic buttons • Protocols • Risk assessments • Organisational policies and procedures			

LO.2: be able to adopt safe working practices

Assessment criteria		Evidence type	Portfolio reference	Date
2.1	follow health and safety requirements and relevant organisational procedures at all times			
2.2	prioritise health and safety requirements over any other organisational requirements			
2.3	report any safety and security risks to the appropriate person using organisational procedures			
2.4	use the correct personal protective equipment according to organisational requirements			
2.5	inform visitors, to work areas, clearly and politely of safety and security procedures			
2.6	prevent unauthorised access to hazardous areas			
2.7	record any safety and security incidents using appropriate information systems			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

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

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Unit 2: Contribute to working relationships in mail services

Unit code: R/600/6706

QCF level: 2

Credit value: 5

Guided learning hours: 21

Unit summary

This unit focuses on the importance of good working relationships in mail services.

The learner should understand the importance of organisational protocols regarding employees and their impact on working relationships. The learner should understand the importance of effective communication. The unit includes reviewing performance and dealing with problems in the workplace.

Assessment methodology

This unit is assessed in the workplace, in conditions resembling the workplace and/or in a formal learning environment as appropriate.

The types of evidence that are presented for assessment and the submission date can be entered against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Please see the assessment information for this qualification and the assessment guidance.

Learning outcomes and assessment criteria

LO.1: understand how to work effectively with others

	Assessment criteria	Examples of content	Evidence type	Portfolio reference	Date
1.1	describe organisational policies and procedures that relate to health, safety and security when working with others	**Policies and procedures** • Health and Safety policy • Security policies • Protection • Equal opportunities			
1.2	describe the relevant organisational procedures for the activities to be undertaken	**Relevant organisational procedures** • Company documentation • Health and safety procedures and processes • Induction training			
1.3	identify policies and legislation relating to diversity in the workplace	**Policies and legislation** • Equality – Equal Opportunities Act • Fair treatment for all • Discrimination • Diversity – age, disability, gender, ethnic origin, religion, sexuality			

LO.1: understand how to work effectively with others

	Assessment criteria	Examples of content	Evidence type	Portfolio reference	Date
1.4	identify assistance that can be provided for people	**Assistance** • Physical, visual, reading, communication • Equal access • Flexible working			
1.5	identify the most common types of information required by people	**Types of information** • Personal information • Policies and procedures • Reports and reviews • Training • Appraisal • Audit • Risk assessment • Compliance			
1.6	identify factors that affect working relationships	**Working relationships** • Stress • Motivation • Respect • Time • Management styles • Management structure • Culture			

LO.1: understand how to work effectively with others

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.7	describe organisational policies for maintaining standards within the organisation	**Maintaining standards** • Training • CPD • Health and Safety • Employment law • Culture of acceptable behaviour, Appraisal • Audit • Job specification			
1.8	identify training and development provided by the organisation to improve own performance	**Training and development** • Training needs • CPD • New technology • Induction • Shadowing/mentoring/coaching			
1.9	describe methods for dealing with problems encountered in the workplace	**Dealing with problems** • Communication • Change management • Complaints procedure • Whistle blowing • Harassment policy			

LO.2: be able to work effectively with others

	Assessment criteria	Evidence type	Portfolio reference	Date
2.1	follow organisational policies and procedures that relate to health, safety and security in mail services			
2.2	follow all organisational policies and legislation in relation to diversity of rights and beliefs			
2.3	provide assistance within agreed roles and responsibilities			
2.4	provide correct information to people in a suitable way			
2.5	treat people and their property in a way that maintains good working relationships			
2.6	maintain standards according to organisational policies			
2.7	respond appropriately to problems with working relationships			
2.8	communicate problems as they occur and follow reporting procedures so that the problem can be solved			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

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

Unit 3: Handle Mail

Unit code: K/600/6761

QCF level: 2

Credit value: 5

Guided learning hours: 28

Unit summary

The learner be required to handle mail in the workplace, whilst carrying out their everyday working role, whether that is in collection, processing or delivery. The learner will need to perform their roles whilst protecting themselves, their colleagues and the mail. The learner will also need to ensure that they use organisational policy to deal with any problems that might occur while handling the mail.

Assessment methodology

This unit is assessed in the workplace, in conditions resembling the workplace and/or in a formal learning environment as appropriate.

The types of evidence that are presented for assessment and the submission date can be entered against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Please see the assessment information for this qualification and the assessment guidance.

Learning outcomes and assessment criteria

LO.1: understand how to handle mail				
Assessment criteria	**Examples of content**	**Evidence type**	**Portfolio reference**	**Date**
1.1 describe the health, safety and security risks and any hazardous conditions in relation to handling the mail	**Health and safety and security risks** • Manual handling • Loading and unloading • Moving mail in containers • Safety using vehicles • Security of mail and mail personnel • Preserving the condition of the mail			
1.2 describe the relevant organisational procedures for the activities to be undertaken	**Organisational procedures** • Standard Operating Procedures(SOPS) • Risk assessments • Induction materials			
1.3 identify the relevant legislation, data protection and confidentiality policies relating to the handling of mail	**Legislation and policies** • Health and safety at work act • Data protection act • Confidentiality policies • Standard operating procedures (SOPs)			

LO.1: understand how to handle mail

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.4	identify different types of mail that can be handled	**Types of mail** • Parcels • Letters • Packages • Pouches • Secure • Confidential • International • Priority of mail			
1.5	explain the importance of maintaining the packaging and condition of the mail	**Maintaining condition** • Customer service • Service expectation • Service level agreement • Safety • Insurance • Care of property			
1.6	identify different types of container that should be used with specific types of mail	**Types of containers** • Cages • Boxes • Pouches • courier bags • secure boxes.			

LO.1: understand how to handle mail

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.7	describe any equipment that can be used to handle the mail	**Equipment** • Containers • Protection equipment • Different types of vehicles • Processing machinery			

LO.2: be able to handle mail

	Assessment criteria	Evidence type	Portfolio reference	Date
2.1	follow health and safety requirements and relevant organisational procedures at all times			
2.2	check that any equipment to be used has been prepared correctly in accordance with organisational procedures			
2.3	locate position and use the appropriate containers in accordance with organisational procedures			
2.4	use the correct handling methods to lift, and transfer different types of mail			
2.5	use the correct handling equipment to lift, and transfer the mail			
2.6	ensure that the fill levels for different containers are not exceeded			
2.7	follow organisational procedures to ensure that the mail is handled in such a way to prevent damage			
2.8	follow quality standards and specific instructions relating to the safe and secure storage of the mail			
2.9	follow procedures and take appropriate action for any suspicious or hazardous mail items			
2.10	communicate problems as they occur and follow organisational procedures so that the problem including handling damaged items, can be solved			
2.11	use information systems to record the handling of mail			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

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

Unit 4: Contribute to the maintenance of equipment used in mail services

Unit code:	M/600/6762
QCF level:	2
Credit value:	4
Guided learning hours:	23

Unit summary

The focus of this unit is the maintenance and safe usage of equipment. The learner will learn why it is important to check equipment, and about maintenance and correct usage. The learner should be able to follow standard operating procedures regarding the use and maintenance of equipment, and know the reporting methods required when equipment malfunctions.

Assessment methodology

This unit is assessed in the workplace, in conditions resembling the workplace and/or in a formal learning environment as appropriate.

The types of evidence that are presented for assessment and the submission date can be entered against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Please see the assessment information for this qualification and the assessment guidance.

Learning outcomes and assessment criteria

LO.1: understand how to contribute to the maintenance of equipment

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.1	describe the health and safety risks in relation to the operation of the equipment	**Health and safety risks** • Personal protection policy (PPP) • Risk assessment • Risks of poor maintenance • Need for training and supervision • Need for development training when equipment is upgraded or processes changed • Standard operating procedures (SOPs)			
1.2	describe the relevant organisational procedures for the activities to be undertaken	**Relevant organisational procedures** • Health and safety policies • Usage procedures • Standard operating procedures (SOPs) • check lists and sign off procedures			

LO.1: understand how to contribute to the maintenance of equipment

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.3	identify the checks required for the equipment	**Equipment checks** • Electrical • Portable appliance testing (PAT) • Moving parts • Guards • Standard operating procedures (SOPs) • Checklists and sign off procedures • Maintenance records			
1.4	identify common types of defects in relation to the equipment that is to be used	**Equipment defects** • Electrical • Mis-feeds • Mechanical failure • Software deficiencies and failure • Operative mistakes • Relevance of equipment to task			

LO.2: be able to contribute to the maintenance of equipment			
Assessment criteria	**Evidence type**	**Portfolio reference**	**Date**
2.1	follow health and safety requirements and relevant organisational procedures at all times			
2.2	undertake the routine checks that must be carried out before and after using the equipment			
2.3	check that the equipment has been maintained and approved for operation before use			
2.4	ensure that the regulations relating to the equipment has been met			
2.5	adjust the equipment in accordance with safety and work requirements			
2.6	identify common types of defects in relation to the equipment that is to be used			
2.7	monitor the equipment during use, and report and/or record any defects and damage to the equipment immediately, according to instructions, operational and organisational procedures and practices			
2.8	Show how to complete post-organisational checks for the equipment in accordance with instructions, operational and organisational procedures and practises			
2.9	Communicate problems as they occur and follow reporting procedures so that the problem can be solved			
2.10	Use information systems to record any faults with the equipment			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

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

Unit 5: Plan routes to mail destinations

Unit code:	T/600/6763
QCF level:	2
Credit value:	6
Guided learning hours:	28

Unit summary

In this unit the learner is going to understand and take part in route planning. The learner will be able to identify a good delivery route, looking at the difference factors that affect the route. They should plan a route that minimises problems and takes account of resources.

Assessment methodology

This unit is assessed in the workplace, in conditions resembling the workplace and/or in a formal learning environment as appropriate.

The types of evidence that are presented for assessment and the submission date can be entered against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Please see the assessment information for this qualification and the assessment guidance.

Learning outcomes and assessment criteria

LO.1: understand how to plan routes to mail destinations				
Assessment criteria	**Examples of content**	**Evidence type**	**Portfolio reference**	**Date**
1.1	describe the health and safety risks in relation to the delivery route	**Health and Safety risks** • Types of route, including rural, urban, • Road works and diversions • manpower requirements • security • traffic flows, time, parking, loading and drop off points • load level, size, toxic, loading • manual handling • driving safety			
1.2	describe the relevant organisational procedures for the activities to be undertaken	**Relevant organisational procedures** • Standard operating procedures (SOPs) • Health and safety policies • Type of company and type of delivery			

LO.1: understand how to plan routes to mail destinations

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.3	describe methods to plan routes for maximum efficiency	**Maximising efficiency** • maps, satellite navigation, internet • deadlines for delivery • service level agreements • traffic flows, road works, routing, order of load • priorities • toll road or motorway			

LO.2: be able to plan routes to mail destinations

	Assessment criteria	Evidence type	Portfolio reference	Date
2.1	follow health and safety requirements and relevant organisational procedures at all times			
2.2	obtain details on the destinations being delivered to			
2.3	obtain details on the types of mail being distributed			
2.4	obtain details on items that require special treatment			
2.5	plan the route for maximum efficiency			
2.6	communicate problems as they occur and follow reporting procedures so that the problem can be solved			
2.7	use information systems to record plans of the routes			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

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

Unit 6: Transport mail

Unit code:	A/600/6764
QCF level:	2
Credit value:	6
Guided learning hours:	27

Unit summary

This unit focuses on the safe transport of mail. The learner should know and be able to follow procedures at the point of loading, through transporting, and processing at the destination. The learner should consider handling and processing for transportation.

Assessment methodology

This unit is assessed in the workplace, in conditions resembling the workplace and/or in a formal learning environment as appropriate.

The types of evidence that are presented for assessment and the submission date can be entered against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Please see the assessment information for this qualification and the assessment guidance.

Learning outcomes and assessment criteria

	Assessment criteria	Examples of content	Evidence type	Portfolio reference	Date
LO.1: understand how to transport the mail					
1.1	describe the health and safety risks in relation to the transportation of the mail	**Health and safety** • security of vehicles • health and safety in loading areas • health and safety when transporting and loading • security of loading areas • maintenance of equipment and vehicles • manual handling			
1.2	describe the relevant organisational procedures for the activities to be taken	**Relevant organisational procedures** • procedures for planning • standard operating procedures (SOPs) • recording • clarifying • verifying • labelling			

LO.1: understand how to transport the mail

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.3	identify regulations relation to the operation of relevant vehicles for the transportation of mail	**Regulations** • MOT, drivers licence, insurance • CPC • weight • Road Traffic Act requirements safety, DSA			
1.4	describe loading and unloading procedures	**Procedures** • relevant equipment • manual handling • weight distribution • standard operating procedures • drop off and pick up manifests			

LO.1: understand how to transport the mail

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.5	identify vehicle restrictions on weight and size of vehicles	**Vehicle restrictions** • routes • weight/height limitations of bridges, tunnels, crossings, type of road • DSA guidelines • Operating procedures • information stickers on vehicle			
1.6	describe information on load restraint and methods	**Load restraint methods** • Strapping • tie downs • restraints			

LO.2: be able to transport mail

Assessment criteria		Evidence type	Portfolio reference	Date
2.1	follow the health and safety requirements and relevant organisational procedures at all times			
2.2	obtain details on the destinations and geography of areas covered			
2.3	obtain details on the types of mail being distributed			
2.4	obtain details on items that require special treatment			
2.5	ensure that the mail has been loaded correctly and safely in accordance with organisational requirements			
2.6	obtain the correct authorization for the transportation of the mail			
2.7	use the appropriate vehicle, equipment and containers to transport the mail			
2.8	deliver the mail to the correct destination			
2.9	ensure that all reasonable precautions have been taken to protect the mail during transportation			
2.10	communicate problems as they occur and follow reporting procedures so that the problem can be solved			
2.11	use information to record the transportation of mail			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

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

Unit 7: Collect mail

Unit code: F/600/6765

QCF level: 2

Credit value: 5

Guided learning hours: 27

Unit summary

This unit focuses on collection of mail, organisation of collection of mail, and security of mail items. The learner to be able to collect the mail, use collection points and schedules, and use different containers. The learner will need to identify and report any problems with mail items, and follow appropriate procedures to deal with problems.

Assessment methodology

This unit is assessed in the workplace, in conditions resembling the workplace and/or in a formal learning environment as appropriate.

The types of evidence that are presented for assessment and the submission date can be entered against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Please see the assessment information for this qualification and the assessment guidance.

Learning outcomes and assessment criteria

LO.1: understand how to collect mail

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.1	describe the health and safety risks in relation to the collection of mail	**Health and safety risks** • Security and personal security • Manual handling • Machinery and equipment • Transport			
1.2	describe methods to deal with suspicious of hazardous mail items	**Methods** • Organisational procedures and protocols			
1.3	describe the relevant organisational procedures for the activities to be undertaken	**Relevant organisational procedures** • Standard operational procedures • Loading manifests and collection schedules • Priorities of mail			
1.4	identify types of mail to be collected	**Types of mail** • Letters, packages, parcels, relevant to organisation • Same day, secure pouch, redirection, courier			

LO.1: understand how to collect mail

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.5	identify collection points for the mail	**Collection points** • Distribution centres • Customers • Businesses • Post boxes, post offices			
1.6	describe types of equipment and processes at collection points	**Equipment and processes** • Trolleys • Lifting equipment • Forklift truck • Cages • Banding equipment • Delivery notes • Loading manifest			
1.7	Identify containers to be used for different types of mail	**Containers** • Bags, pouches, cages, boxes			

LO.1: understand how to collect mail

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.8	describe collection services that are available	**Collection services** • Emergency/urgent • Secure • Business, corporate, public sector • Courier • Personal customer			

LO.2: be able to collect mail

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
2.1	follow health and safety requirements and relevant organisational procedures at all times				
2.2	confirm details of collection schedules and types of mail being collected				
2.3	operate equipment and follow processes at the collection points correctly				
2.4	collect the mail from the collection points according to the agreed schedule				
2.5	communicate problems as they occur and follow reporting procedures so that the problem can be solved				
2.6	use information to record the collection of mail				

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

Internal verifier signature: _____   Date: _____

(*if sampled*)

Unit 8: Process mail instructions

Unit code: J/600/6766

QCF level: 2

Credit value: 4

Guided learning hours: 20

Unit summary

This unit focuses on the importance of understanding mail instructions for specific items or containers throughout the mail service processes. The learner should be able to understand mail instructions, and process the mail accordingly, in line with organisational policy. The learner should be able to identify and report any problems appropriately.

Assessment methodology

This unit is assessed in the workplace, in conditions resembling the workplace and/or in a formal learning environment as appropriate.

The types of evidence that are presented for assessment and the submission date can be entered against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Please see the assessment information for this qualification and the assessment guidance.

Learning outcomes and assessment criteria

LO.1: understand how to process mail instructions				
Assessment criteria	**Examples of content**	**Evidence type**	**Portfolio reference**	**Date**
1.1	describe the health and safety risks in relation to the processing of mail	**Health & Safety Risks:** • Equipment • Manual Handling • Personal protection			
1.2	describe the relevant organisational procedures for the activities to the undertaken	**Organisational procedures** • Standard Operating Procedures(SOPs), • Risk assessments, • Induction materials			
1.3	describe the process for different types of mail	**Mail processing:** • Standard operating procedures (SOPs) • Types of mail and sizes • Priority for mail			
1.4	describe methods and constraints for revealing mail instructions	**Methods and constraints** • Privacy and confidentiality • Electronic systems			

LO.1: understand how to process mail instructions

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.5	identify types of inconsistencies with different types of mail	**Inconsistencies** • Damaged • leaking package • unknown sender • insufficient postage • incorrect classification • incorrect delivery			
1.6	identify the priority to give different types of mail	**Types of mail** • Size • Classification (packet, parcel, letter) • Secure • Priority and service			
1.7	describe organisational guidelines relating to the opening of different types of mail	**Guidelines** • Standard operating procedures (SOPs), to include reasons for opening mail • Security • Missing destination or sender information • Damage to mail			

LO.1: understand how to process mail instructions

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.8	identify information on destinations contained in the mail instructions	**Information on destinations** • Location • Routes • Local collection or delivery points • Consignment notes			

LO.2: be able to process mail instructions

Assessment criteria		Evidence type	Portfolio reference	Date
2.1	follow health and safety requirements and relevant organisational procedures at all times			
2.2	confirm the instructions for the mail to be processed			
2.3	reveal mail instructions when these are obscured or unclear			
2.4	identify inconsistencies in the mail instructions, and determine which should be given priority			
2.5	process mail with incomplete information			
2.6	allocate mail to the correct containers for further processing			
2.7	ensure that any documentation accompanying the mail is correctly completed			
2.8	communicate problems as they occur and follow reporting procedures so that the problem can be solved			
2.9	use information systems to record the processing of mail instructions			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*)

Unit 9: Separate mail for processing

Unit code: Y/600/6769

QCF level: 2

Credit value: 5

Guided learning hours: 27

Unit summary

The focus of this unit is to enable the learner to be able to separate mail into different types. This is part of the preparation for sorting, distribution and delivery. They will need to recognise the type or priority of mail, classify and separate it and use the correct systems, equipment and containers. The learner should understand the procedures required to deal with any problems and report them appropriately.

Assessment methodology

This unit is assessed in the workplace, in conditions resembling the workplace and/or in a formal learning environment as appropriate.

The types of evidence that are presented for assessment and the submission date can be entered against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Please see the assessment information for this qualification and the assessment guidance.

Learning outcomes and assessment criteria

LO.1: understand how to separate mail for processing

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.1	describe the health and safety risks in relation to the separation of the mail	**Health & Safety Risks:** • Manual handling • Equipment • Processing site • Moving mail • Need for personal protection equipment (PPE)			
1.2	describe the methods to deal with suspicious or dangerous mail items	**Methods:** • Follow SOPs • Identify mail items • Report • Isolate items or area • Minimise contact with items • Escalate reports			

LO.1: understand how to separate mail for processing

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.3	describe the relevant organisational procedures for the activities to be undertaken	**Process:** • Standard Operating Procedures(SOPS) • Risk assessments • Induction materials • Training on Equipment • Supervision			
1.4	identify types of mail that need to be separated	**Types of mail** • Priority • Size • Service level agreement • Delivery or collection areas			
1.5	describe processes for separating different types of mail	**Processes** • Mechanical separation • Electronic equipment • Manual separation • Checks and monitoring			

LO.1: understand how to separate mail for processing

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.6	describe mail flows in the organisation	**Mail flows** • Company operating structures • Company procedures • Collection • Delivery • Transportation • Processing			
1.7	describe methods of monitoring mail flows	**Monitoring** • Manifests • Checklists • Sampling • Electronic systems			
1.8	identify containers to be used for different types of mail	**Mail containers:** • cages • boxes • pouches • courier bags • secure boxes.			

LO.2: be able to separate mail for processing

	Assessment criteria	Evidence type	Portfolio reference	Date
2.1	follow health and safety requirements and relevant organisational procedures at all times			
2.2	confirm the types of mail to be separated			
2.3	separate mail requiring special handling or distribution requirements			
2.4	monitor the flow of mail			
2.5	respond appropriately to any mail processing problems			
2.6	respond appropriately to any mail that appears to present a safety or security risk			
2.7	place separated mail in the appropriate containers ready for processing			
2.8	communicate problems as they occur and follow reporting procedures so that the problem can be solved			
2.9	use information systems to record the separation of mail for processing			

Learner name: _____ Date: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(*if sampled*)

Unit 10: Process mail through automated systems

Unit code: L/600/6770

QCF level: 2

Credit value: 30

Guided learning hours: 6

Unit summary

The focus of this unit is processing mail through automated systems.

The learner should be able to process mail through the relevant automated systems. This should involve checking the equipment that is required, starting the automated processing, monitoring the process, and finishing the process. It also includes loading and unloading the mail. The learner should be able to identify any problems, take the appropriate action and report any issues appropriately.

Assessment methodology

This unit is assessed in the workplace, in conditions resembling the workplace and/or in a formal learning environment as appropriate.

The types of evidence that are presented for assessment and the submission date can be entered against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Please see the assessment information for this qualification and the assessment guidance.

Learning outcomes and assessment criteria

LO.1: understand how to process mail through automated systems				
Assessment criteria	**Examples of content**	**Evidence type**	**Portfolio reference**	**Date**
1.1 describe the health and safety risks in relation to processing mail through automated systems	**Health & Safety Risks:** • Manual handling • Equipment risks • Equipment maintenance • Personal protection equipment			
1.2 describe the handling risks involved in processing different types of mail	**Handling risks** • Equipment and machinery • Personal safety • Precautions and procedures			
1.3 describe the relevant organisational procedures for the activities to be undertaken	**Organisational procedures** • Standard Operating Procedures(SOPS) • Risk assessments • Induction materials • Training • Checks and monitoring			

LO.1: understand how to process mail through automated systems

Assessment criteria	Examples of content	Evidence type	Portfolio reference	Date
1.4 describe automated systems for different processing tasks	**Automated systems** • Relevant to workplace • Relevant to job role • Separation • Sorting • Electronic identification • Franking			
1.5 describe methods of preparing the mail for different types of equipment and processing	**Preparation of mail** • Separation • Sorting • Checking • Electronic identification			
1.6 describe methods of loading and feeding mail into different automated systems	**Loading and feeding** • Using containers correctly • Standard operating procedures • Health and safety • User instructions			

LO.1: understand how to process mail through automated systems

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.7	identify capabilities of different types of equipment	**Capabilities** • Speed • Capacity • Type of mail • Identification of mail • Processing mail			
1.8	describe monitoring procedures and systems	**Monitoring** • Equipment checks • Performance checks • Process maintenance • Manifests • User instructions • Standard operating procedures			
1.9	identify different machine performance measures	**Performance measures** • Targets • Meeting priorities • Jams, breakdowns, delays			

LO.1: understand how to process mail through automated systems

Assessment criteria	Examples of content	Evidence type	Portfolio reference	Date
1.10 describe methods of unloading different types of equipment	**Unloading** • Using containers correctly • Standard operating procedures • Health and safety • User instructions			
1.11 identify containers that should be used for different types of mail	**Containers** • Boxes • Cages • Bags • Secure • Priority			
1.12 identify destinations of processed mail	**Destinations** • Processing centres • Delivery points • Collection points • Distribution centres			

LO.2: be able to process mail through automated systems

Assessment criteria		Evidence type	Portfolio reference	Date
2.1	follow health and safety requirements and relevant organisational procedures at all time			
2.2	check that automated systems are ready and safe for the different types of mail being processed			
2.3	handle the mail safely to minimise the risk of injury to people or to the mail			
2.4	prepare the mail for processing according to the requirements of the equipment			
2.5	load the mail correctly into the automated systems			
2.6	feed the mail through the automated systems at an appropriate rate for the capabilities of the equipment			
2.7	monitor the accuracy and speed of the automated systems at suitable intervals			
2.8	respond appropriately to any equipment problems			
2.9	unload mail from the automated systems into the appropriate bundles and containers			
2.10	communicate problems as they occur and follow reporting procedures so that the problem can be solved			
2.11	use information systems to record the processing of mail through automated systems			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

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

Unit 11: Sort mail

Unit code: D/600/6773

QCF level: 2

Credit value: 5

Guided learning hours: 26

Unit summary

The focus of this unit is for the learner to be able to sort mail. This can be as preparation for further processing, distribution or delivery. The learner will need to identify the type or priority of the mail being sorted, sort the mail according to its information and use containers appropriately. The learner should identify and report any problems and take the appropriate action.

Assessment methodology

This unit is assessed in the workplace, in conditions resembling the workplace and/or in a formal learning environment as appropriate.

The types of evidence that are presented for assessment and the submission date can be entered against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Please see the assessment information for this qualification and the assessment guidance.

Learning outcomes and assessment criteria

LO.1: understand how to sort the mail manually				
Assessment criteria	**Examples of content**	**Evidence type**	**Portfolio reference**	**Date**
1.1 describe the health and safety risks in relation to sorting the mail manually	**Health & Safety Risks:** • Personal protection equipment (PPE) • Safe manual handling • Risks in sorting area • Safe use of containers • Safe use of equipment			
1.2 describe methods to deal with suspicious or hazardous mail items	**Methods to deal with hazardous mail items** • Identification • Notification • Isolation • Reporting			
1.3 describe the relevant organisational procedures for the activities to be undertaken	**Organisational procedures** • Standard Operating Procedures(SOPS) • Risk assessments • Induction materials • Training • Checks and monitoring			

LO.1: understand how to sort the mail manually

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.4	identify types of mail that need to be sorted	**Types of mail** • Packages • Parcels • Letters • Secure			
1.5	describe methods for removing mail from different types of container	**Methods of removing mail** • Manual • Automated • Health and safety issues			
1.6	identify the information displayed on the mail	**Information** • Priority • Destination • Type			
1.7	identify the priority given to different types of information	**Priority** • Service level agreement • Fragile • Confidential • Secure • Next day delivery			

LO.1: understand how to sort the mail manually

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.8	describe actions to be taken if information cannot be read	**Actions to be taken** • Standard operating procedures • Verifying information • Sender information • Destination information			
1.9	identify organisational requirements for speed and accuracy for sorting mail	**Organisational requirements** • Standard operating procedures • Business targets • Service level agreements • Procedures to solve problems or delays in sorting			
1.10	describe different special handling and sorting requirements	**Special handling and sorting** • Fragile • Hazardous • Large items of mail • Priority of mail			

LO.1: understand how to sort the mail manually

Assessment criteria	Examples of content	Evidence type	Portfolio reference	Date
1.11 identify containers that should be used for different types of mail	**Mail containers:** • cages • boxes • pouches • courier bags • secure boxes			
1.12 identify capacities of the containers being used	**Capacity** • Weight of item • Size • Number of items • Types of items			

LO.2: be able to sort mail manually

	Assessment criteria	Evidence type	Portfolio reference	Date
2.1	follow the health and safety requirements and organisational procedures at all times			
2.2	confirm the types of mail being sorted			
2.3	remove the mail from the appropriate containers ready for sorting			
2.4	reading the information on the mail correctly, taking appropriate action when the information is not available			
2.5	sort the mail accurately at the appropriate rate			
2.6	process mail requiring special handling or sorting			
2.7	respond appropriately to any mail that appears to present a safety or security risk			
2.8	allocate the mail into its correct containers for distribution			
2.9	communicate problems as they occur and follow reporting procedures so that the problem can be solved			
2.10	use information systems to record the sorting of mail			

Learner name: _____

Learner signature: _____ Date: _____

Assessor signature: _____ Date: _____

Internal verifier signature: _____ Date: _____

(if sampled)

Unit 12: Deliver mail

Unit code: H/600/6774

QCF level: 2

Credit value: 6

Guided learning hours: 28

Unit summary

This unit focuses on delivering mail to customers. The learner should be able to identify the delivery plan and route and sort and bundle the mail. The route and bundles should be organised so the mail is delivered in the most efficient way. The learner should be able to protect the mail during delivery, and report any problems with the delivery, taking appropriate action.

Assessment methodology

This unit is assessed in the workplace, in conditions resembling the workplace and/or in a formal learning environment as appropriate.

The types of evidence that are presented for assessment and the submission date can be entered against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Please see the assessment information for this qualification and the assessment guidance.

Learning outcomes and assessment criteria

LO.1: understand how to deliver mail

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.1	describe the health and safety risks in relation to the delivery of mail	**Health & Safety Risks:** • Manual handling • Transporting mail on delivery • Route safety and security • Delivery vehicles • Delivery equipment			
1.2	describe handling risks involved in delivering different types of mail	**Handling risks** • Lifting • Size of mail • Weight of mail • Delivery point risks			
1.3	describe the relevant organisational procedures for the activities to be undertaken	**Procedures:** • Standard operating procedures (SOPs) • Schedules and manifests • Delivery routes • Bundle identification • Delivery instructions			

LO.1: understand how to deliver mail

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.4	describe delivery schedules, including routes and timings	**Mail Delivery:** • SOPS for delivering mail to different types of addresses • delivery points (PO Box, private dwelling, business). • Types of delivery service(Special, Next day etc) • Fragile or large items • Targets for delivery • Service level agreements			
1.5	identify types of mail that need to be delivered	**Types of mail** • Letters • Parcels • Packages • Secure • Next day • Fragile • Signed for • Courier deliveries			

LO.1: understand how to deliver mail

Assessment criteria		Examples of content	Evidence type	Portfolio reference	Date
1.6	identify locations of containers with mail ready for delivery	**Locations** • Local delivery centre • Regional delivery centre • Processing centre • Sorting office • Post office			
1.7	identify types of special treatment for different types of mail	**Special treatment:** • Next day • Special delivery • Signed for • Secure • Courier • Fragile • Large or heavy items			

LO.1: understand how to deliver mail

Assessment criteria	Examples of content	Evidence type	Portfolio reference	Date
1.8 describe relevant organisational guidelines for protecting mail	**Protecting mail** • Delivery instructions • Secure delivery points • Alternative delivery points • Notification of delivery attempt • When to return mail to delivery office • Security on route • Security in delivery vehicles			
1.9 describe methods and procedures for delivering mail to different types of addresses	**Different addresses** • Business addresses • Domestic addresses • PO boxes			
1.10 identify types of equipment and processes at delivery points	**Equipment and processes** • Trolleys • Vehicles • Unloading equipment • Information systems • Delivery processes			

LO.1: understand how to deliver mail

Assessment criteria	Examples of content	Evidence type	Portfolio reference	Date
1.11 identify delivery services that are available	**Delivery services** • Next day • Overnight • Courier • Secure			

LO.2: be able to deliver mail

Assessment criteria		Evidence type	Portfolio reference	Date
2.1	follow health and safety requirements and relevant organisational procedures at all times			
2.2	check operational details of the delivery route, schedule and types of mail being delivered			
2.3	obtain mail from the correct locations			
2.4	read information on the mail correctly taking appropriate action when the information is not available			
2.5	sort and bundle the mail into a suitable order for the delivery route			
2.6	deliver mail items requiring special treatment			
2.7	protect the mail during delivery at all times			
2.8	deliver the mail according to the types of mail and the agreed delivery schedule			
2.9	operate equipment and processes at the delivery points correctly			
2.10	ensure that all communications with people are conducted appropriately, and provide them with any relevant information on the delivery service			
2.11	communicate problems as they occur and follow reporting procedures so that the problem can be solved			
2.12	use information systems to record the delivery of mail			

Learner name: _____   Date: _____

Learner signature: _____   Date: _____

Assessor signature: _____   Date: _____

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

Further information

Our customer service numbers are:

BTEC and NVQ	0844 576 0026
GCSE	0844 576 0027
GCE	0844 576 0025
The Diploma	0844 576 0028
Dada and other qualifications	0844 576 0031

Calls may be recorded for training purposes.

Useful publications

Related information and publications include:

- *Centre Handbook for Edexcel QCF NVQs and Competence-based Qualifications* published annually
- *Regulatory Arrangements for the Qualification and Credit Framework* (published by Equal, 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

To obtain the National Occupational Standards go to www.ukstandards.org.uk.

Professional development and training

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). 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: Quality assurance

Key principles of quality assurance

- A centre delivering Edexcel qualifications must be an Edexcel-recognised centre and must have approval its for qualifications.
- The centre agrees, as part of gaining recognition, to abide by specific terms and conditions relating to 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 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. The specific arrangements for working with centres will vary. Edexcel seeks to ensure that the quality-assurance processes it uses do not inflict undue bureaucratic processes on centres, and works to support them 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, 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 B: Centre certification and registration

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 action
- 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 should be 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.

Annexe C: Assessment guidance

For updates and further information, please see the Mail Services page of the Edexcel website (www.edexcel.com)

Skills for Logistics

Assessment Guidance for the Qualifications and Credit Framework

March 2011

Assessment Guidance for the Qualifications and Credit Framework

1. Introduction

This document is for those Awarding Organisations that intend to offer QCF qualifications based on Skills for Logistics National Occupational Standards. It is a tool that can be used in conjunction with any unit whose purpose is to confirm occupational competence. Such units are designed and informed by the views of logistics employers to meet the needs of the UK economy. They are designed to prepare candidates for further learning or training, or update their existing knowledge and skills, or their continuing professional development. Skills for Logistics aim to develop and implement combined units of assessment, based on relevant National Occupational Standards (NOS), which are fit for purpose and maintain quality assured approaches to assessment and verification

This guidance for assessment should be used by Awarding Organisations to ensure that 'competence' units are assessed in accordance with the needs of employers and stakeholders in the sector. The intention of this guidance is to minimise bureaucracy whilst maintaining integrity and quality assurance of assessment and verification of achievement.

This document applies to all qualifications in the Qualifications Credit Framework (QCF) from the 1st October 2010 and that fall within the Skills for Logistics sector. It replaces any other assessment strategies and guidance currently in use.

QCF qualifications are not currently used as a 'Licence to Practice' in the Logistics Sector, they are however recognised and supported by employers and stakeholders in the sector.

2. Definitions

Certain terms used in this document have particular meanings and that should be taken in context within the assessment guidance:

- to assess: to evaluate in a detailed and analytical way.*
- to verify: to demonstrate that something is true, accurate or justified*
- competence: the proven/demonstrated and individual –capacity to use know-how, skills, knowledge in order to meet usual and –changing occupational requirements.*

*reference Oxford English Dictionary

Skills for Logistics consider the combination of skills and knowledge to be fundamental to the furthering of the skills agenda as outlined in the White Paper; 'Skills for Growth – the national skills strategy' BIS November 2009.

Competence for a particular job role is likely to include the generic skills required for that occupation, specialised skills for a particular supply chain and employability skills such as team working, creative thinking, communication and customer care. The inclusion of such skills in a qualification creates a more holistic approach to developing the skills required for the needs of the UK economy.

3. External Quality Control

External quality control is achieved through rigorous monitoring and standardisation of assessment decisions; Awarding Organisations achieve this by operating within their existing systems for quality monitoring, risk assessment, and management of their approved centres following guidance issued by the Regulatory Authorities.

4. Additional Assessment Needs

QCF units that are used to assess competence within the QCF need to be assessed and quality assured in accordance with the following additional requirements:

1   When QCF units are used to assess competence, Awarding Organisations (AO's) are required to make sure their recognised assessment centres assess learners according to the NOS issued by the SSC for learning and development.

2   Learners should be enabled to complete, wherever possible, real work activities that provide both evidence of underpinning knowledge and evidence of competence to demonstrate they have met the learning outcomes and assessment criteria of the QCF unit and that they are competent in relation to the NOS

3   When a Learner is unable to complete real work activities simulation is permitted, circumstances in which simulation may take place are:

– a learner is required to complete a work activity that does not occur on a regular basis and therefore opportunities to complete a particular work activity do not easily arise,

– a learner is required to respond to a situation that rarely occurs, such as responding to an emergency situation,

– the safety of the learner and/or resources would be put at risk

4   When simulation is used, those who assess the learner should be confident that the simulation replicates the workplace to such an extent that learner's will be able to fully transfer their occupational competence to the workplace and real situations.

5   Assessors must be occupationally competent in the occupational area they are assessing where they have sufficient and relevant technical/occupational competence in the unit, at or above the level of the unit being assessed

6   Assessors and Internal Verifiers must hold or be working towards the appropriate regulatory body approved qualifications for assessment and internal verification, such as those developed by Lifelong Learning UK.

7   Assessors must be fully conversant with the units against which the assessments and verifications are to be undertaken

8   Assessors must carry out assessment according to the relevant Learning and Development National Occupational Standards *(approved January 2010)**

*these can be found on the National Occupational Standards Directory: www.ukstandards.org.uk

9   All assessment decisions made by those working towards a relevant assessor qualification must be verified by a qualified Teacher/Trainer, Assessor or an Assessor recognised by the Awarding Organisation as appropriate

10   Trainee Assessors should have a plan, which is overseen by the relevant assessment centre, to achieve the relevant assessor qualification within an agreed timescale

5. Quality Assurance Requirements

This section summarises the quality assurance requirements that apply to QCF units and qualifications used to demonstrate competence. Awarding Organisations should ensure that recognised assessment centres are familiar with these requirements.

1   QCF units that are used to assess competence must be verified:
- internally by an Internal Verifier who is accountable to the assessment centre
- externally by an External Verifier who is accountable to the Awarding Organisation

2   Internal Verifiers must:
- hold or be working towards a suitable Internal Verifier qualification such as one based on LLUK standards
- have sufficient and relevant technical/occupational familiarity with the units that are verified
- be fully conversant with the standards and assessment criteria in the units to be assessed
- understand the Awarding Organisation's quality assurance systems and requirements for this qualification

3   Trainee Internal Verifiers must have:
- a plan that is overseen by the recognised assessment centre, to achieve an appropriate Internal Verifier qualification within an agreed timescale

4   External Verifiers must:
- hold or be working towards a suitable External Verifier qualification such as one based on LLUK standards
- have sufficient and relevant technical/occupational familiarity with the units that are externally verified
- be fully conversant with the standards and assessment criteria in the units to be assessed
- understand the Awarding Organisation's quality assurance systems and requirements for this qualification

5   Trainee External Verifiers should have:
- a plan that is overseen by the recognised assessment centre, to achieve an appropriate External Verifier qualification within an agreed timescale

6   Skills for Logistics recognise that employers in the sector provide in-house training, development and assessment processes that can meet the standards set for Assessors and Verifiers. Where an employer maps its in-house training, development and assessment

processes against the Assessor and Verifier National Occupational Standards and shows that all are met; subject to agreement with the Awarding Organisation and Skills for Logistics, an employer is permitted to carry out Assessment and Verification using staff members who do not hold Assessor and Verifier qualifications. Such individuals must however, meet all other requirements for Assessors and Verifiers.

6. External Monitoring/Risk Management

Awarding Organisations should decide the frequency of external monitoring activities, which should be based on the risks associated with a qualification of this type and an assessment of the centre's performance and past record.

Awarding Organisations should develop suitable auditing processes, where naturally occurring quality assurance already exist in the workplace assessment environments.

7. Equality and Diversity

Awarding Organisations and their assessment centre staff must ensure no learner is discriminated against, either directly or indirectly on the grounds of: race, colour, ethnicity, nationality, ethnicity, sex, marital status, gender reassignment, sexual orientation, disability, social status, belief or non-belief, language with the exception of the Welsh language and the legal requirements of the Welsh Language Act.

Annex C

Specific Criteria for the Assessment, Verification and Certification of Mail Services/Package Distribution

In the case of qualifications titled **Mail Services or Package Distribution** it is recognised that there are situations where the workplace may not be appropriate, or waiting for naturally occurring evidence is impractical in relation to units based on the National Occupational Standard SFL140 '**Contribute to safety and security in mail services'**. Skills for Logistics therefore allow centres to set up or devise assessment situations for this unit, with the prior agreement of the external verifier that the simulation is valid before assessment is undertaken.