

# **SVQ 2 in Business and Administration at SCQF Level 5**

## **Logbook for candidates**

SVQ

August 2012

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# Section 1: SVQ 2 in Business and Administration at SCQF Level 5

## Introduction

This document contains information specific to the SVQ 2 in Business and Administration at SCQF Level 5.

## National Occupational Standards and SVQs

The standards, Assessment Strategy and qualification structures for business and administration are owned by the Council for Administration, who reviewed these National Occupational Standards. The SVQs have been developed from the National Occupational Standards.

The SVQ 2 in Business and Administration at SCQF Level 5 gives recognition of candidates' skills, knowledge and understanding. It allows candidates to gain a qualification in the workplace that relates to their job and promotes good working practice.

You can contact the Sector Skills Council (SSC) at:

CfA Business Skills @ Work

6 Graphite Square, Vauxhall Walk, London SE11 5EE

Telephone: 0207 091 9620 Fax: 0207 091 7340

Email: [info@cfa.uk.com](mailto:info@cfa.uk.com) This e-mail address is being protected from spambots. You need JavaScript enabled to view it

This SVQ is designed to be assessed in the workplace, or in conditions resembling the workplace. However, simulation of real working practice might be permitted. Where this is allowed it will be shown in the individual units, within the standards that are in this logbook.

Simulation must be carried out in conditions resembling the workplace. These conditions are described as being a 'realistic working environment' (RWE).

## Which SVQs in Business and Administration are available?

The SVQs in Business and Administration are available as follows:

- SVQ 2 in Business and Administration at SCQF Level 5
- SVQ 3 in Business and Administration at SCQF Level 6.

It is important that you select the most appropriate level related to your work role.

## **Who is this SVQ for?**

### **The SVQ 2 in Business and Administration at SCQF Level 5**

SVQs in Business and Administration are designed for people at various levels within business organisations, and are therefore appropriate to many job roles from junior administrators through to office managers.

This is a work-based qualification, therefore candidates should be in a job role which enables them to provide the required evidence in a working environment.

### **What progression opportunity does this SVQ offer me?**

There is some overlap of Units between the different levels of SVQ allowing candidates to progress to other Business and Administration SVQs as their job role develops or changes.

Candidates achieving an SVQ in Business and Administration will have improved employment prospects in the occupational area.

## What is the structure of the SVQ 2 in Business and Administration at SCQF Level 5?

To achieve the whole qualification at SCQF Level 5, you must prove competence in **three** mandatory units and **five** optional units.

You must complete **eight** units, of which:

- **three units must** be selected from **Group A**: mandatory core units
- **at least three units must** be selected from **Group B**: optional units
- **two further units must** be selected from either **Group B**: optional units or **Group C**: optional units.

The following rules apply to how units may be selected:

- **a maximum of two units only** may be selected from Groups B11:IT, B12:Finance, C13:IT, or C14:Finance
- **either** unit S211 (B2:Document Production) or S311 (C2:Document Production) may be selected, **but not both**
- **only one unit** may be selected from units S212 (B2:Document Production) S213 (B2:Document Production) or S312 (C2:Document Production)
- **either** unit S214 (B2:Document Production) or S313 (C2:Document Production) may be selected, **but not both**
- **either** unit S215 (B2:Document Production) or S314 (C2:Document Production) may be selected, **but not both**
- **either** unit S222 (B3:Events and Meetings) or S319 (C3:Events and Meetings) may be selected, **but not both**
- **either** unit S223 (B3:Events and Meetings) or S321 (C3:Events and Meetings) may be selected, **but not both**
- **either** unit S224 (B3:Events and Meetings) or S320 (C3:Events and Meetings) may be selected, **but not both**
- **only one unit** may be selected from the following four: unit S236a or S236b (B11: IT) or S114a or S114b (C13: IT)
- **either** unit S237 (B11: IT) or S115 (C13: IT) may be selected **but not both**
- **either** unit S238 (B11: IT) or S116 (C13: IT) may be selected **but not both**
- **either** unit S239 (B11: IT) or S117 (C13: IT) may be selected **but not both**
- **either** unit S240 (B11: IT) or S118 (C13: IT) may be selected **but not both**
- **either** unit S241 (B11: IT) or S119 (C13: IT) may be selected **but not both**
- **either** unit S242 (B11: IT) or S120 (C13: IT) may be selected **but not both**
- **either** unit S243 (B11: IT) or S121 (C13: IT) may be selected **but not both**
- **either** unit S244 (B11: IT) or S122 (C13: IT) may be selected **but not both**
- **either** unit S245 (B11: IT) or S123 (C13: IT) may be selected **but not both**
- **either** unit S246 (B11: IT) or S124 (C13: IT) may be selected **but not both**
- **either** unit S252 (B11: IT) or S113 (C13: IT) may be selected **but not both**.

## Mandatory units for the SVQ 2 in Business and Administration at SCQF Level 5

### Group A: Mandatory core units

You must achieve all of the units listed below:

Unit number	Unit code	Title	Unit credit	SCQF level
1	S201	Agree how to manage and improve own performance in a business environment	4	5
2	S202	Undertake work in a business environment	2	5
3	S205	Prepare to communicate in a business environment	3	5

## Optional units for the SVQ 2 in Business and Administration at SCQF Level 5

You must achieve five of the optional units listed below:

- At least three units must be selected from Group B
- Two further units must be selected from either Group B or Group C

### Group B

Unit number	Unit code	Title	Unit credit	SCQF level
<b>B1: Work responsibilities</b>				
4	S203	Plan how to solve business problems	4	5
5	S204	Work with other people in a business environment	3	5
<b>B2: Document production</b>				
6	S211	Produce documents in a business environment	4	5
7	S212	Prepare text from notes	4	6
8	S213	Prepare text from notes using touch typing (40 wpm)	3	5
9	S214	Prepare text from shorthand (60 wpm)	8	5
10	S215	Prepare text from recorded audio instruction (40 wpm)	4	5
<b>B3: Events and meetings</b>				
11	S222	Support the organisation and co-ordination of events	5	5
12	S223	Support the organisation of business travel or accommodation	3	5
13	S224	Support the organisation of meetings	4	5

Unit number	Unit code	Title	Unit credit	SCQF level
<b>B4: Communications</b>				
14	S206	Use electronic message systems	1	5
15	S207	Use a diary system	3	5
16	S208	Take minutes	4	5
<b>B5: Customer service</b>				
17	S209	Handle mail	3	5
18	S210	Provide reception services	3	5
19	S250	Meet and welcome visitors	3	5
<b>B6: Manage information and data</b>				
20	S216	Organise and report data	3	5
21	S217	Research information	4	5
22	S218	Store and retrieve information	3	5
23	S219	Provide archive services	2	5
24	S226	Support the management and development of an information system	7	7
<b>B7: Business resources</b>				
25	S220	Use office equipment	3	5
26	S221	Maintain and issue stationery stock items	3	5
<b>B8: Innovation and change</b>				
27	S225	Respond to change in a business environment	3	5
<b>B9: Specialised business support services - human resources</b>				
28	S227	Administer HR records	3	5
29	S228	Administer the recruitment and selection process	4	5
<b>B10: Specialised business support services - parking</b>				
30	S251	Administer parking dispensations	4	5

Unit number	Unit code	Title	Unit credit	SCQF level
<b>B11: IT</b>				
31	S236a	Bespoke software 2	3	5
32	S236b	Specialist software 2	3	5
33	S237	Data management software 2	3	5
34	S238	Database software 2	4	5
35	S239	Improving productivity using IT 2	3	4
36	S240	IT security for users 2	2	5
37	S241	Presentation software 2	4	5
38	S242	Setting up an IT System 2	4	5
39	S243	Spreadsheet software 2	4	5
40	S244	Using collaborative technologies 2	4	5
41	S245	Website software 2	4	5
42	S246	Word processing software 2	4	5
43	S252	Using email 2	3	5
<b>B12: Finance</b>				
44	S247	Control payroll	-	-
45	S248	Account for income and expenditure	-	-
46	S249	Draft financial statements	-	-

## Group C

Unit number	Unit code	Title	Unit credit	SCQF level
<b>C1: Project management</b>				
47	S324	Contribute to running a project	5	6
<b>C2: Document production</b>				
48	S311	Design and produce documents in a business environment	4	6
49	S312	Prepare text from notes using touch typing (60 wpm)	4	6
50	S313	Prepare text from shorthand (80 wpm)	8	6
51	S314	Prepare text from recorded audio instruction (60 wpm)	4	6
<b>C3: Events and meetings</b>				
52	S319	Organise and co-ordinate events	8	6
53	S320	Plan and organise meetings	5	6
54	S321	Organise business travel or accommodation	5	6
<b>C4: Communications</b>				
55	S106	Make and receive telephone calls	3	5
56	S309	Develop a presentation	3	6
57	S310	Deliver a presentation	3	6
<b>C5: Customer service</b>				
58	S325	Deliver, monitor and evaluate customer services to internal customers	3	6
59	S326	Deliver, monitor and evaluate customer services to external customers	3	6
<b>C6: Manage information and data</b>				
60	S315	Support the design and development of information systems	7	6
61	S316	Monitor information systems	7	6
62	S317	Analyse and report data	6	6
<b>C7: Specialised business support services - education</b>				
63	S329	Provide administrative support in schools	8	6

Unit number	Unit code	Title	Unit credit	SCQF level
<b>C8: Specialised business support services - parking</b>				
64	S330	Administer parking and traffic challenges, representations and civil parking appeals	9	6
65	S331	Administer statutory parking and traffic appeals	9	7
66	S332	Administer parking and traffic debt recovery	6	7
<b>C12: Health, safety and security of people, premises and property</b>				
67	S112	Use occupational and safety guidelines when using keyboards	2	4
<b>C13: IT</b>				
68	S114a	Bespoke software 1	2	4
69	S114b	Specialist software 1	2	4
70	S115	Data management software 1	2	4
71	S116	Database software 1	3	4
72	S117	Improving productivity using IT 1	3	4
73	S118	IT security for users 1	1	4
74	S119	Presentation software 1	3	4
75	S120	Setting up an IT System 1	3	4
76	S121	Spreadsheet software 1	3	4
77	S122	Using collaborative technologies 1	3	4
78	S123	Website software 1	3	4
79	S124	Word Processing software 1	3	4
80	S113	Using email 1	2	4
<b>C14: Finance</b>				
81	S125	Calculate pay	-	-

## Section 2: Examples of forms

### Collecting your evidence

This section contains examples of the forms you, your assessor and the internal verifier will use while you are undertaking your SVQ 2 in Business and Administration at SCQF Level 5.

The forms are:

- Form 1: Portfolio title page
- Form 2: Personal profile
- Form 3: Contents checklist
- Form 4: Index of evidence
- Form 5: Unit assessment plan
- Form 6: Unit sign-off record
- Form 7: Work Log
- Form 8: Observation record
- Form 9: Witness testimony
- Form 10: Expert witness evidence record
- Form 11: Record of questions and candidates answers

You should ask your assessor for further advice and support if you are still unsure about how to use the forms and who should complete them.



## Example form 1 – Portfolio title page

<b>Name:</b>	
<b>Job title:</b>	
<b>Name of employer/training provider/college:</b>	
<b>Their address:</b>	
<b>Postcode:</b>	
<b>Telephone number (Home):</b>	<b>(Work):</b>
<b>Email address:</b>	<b>Fax number:</b>
<b>SVQ:</b>	
<b>Level:</b>	
<b>Units submitted for assessment:</b>	
<b>Mentor/Supervisor:</b>	
<b>(Please provide details of mentor's/supervisor's experience):</b>	
<b>Assessor:</b>	<b>Date:</b>



## Example form 2 – Personal profile

<b>Name:</b>	
<b>Address:</b>	
<b>Postcode:</b>	
<b>Telephone number (Home):</b>	<b>(Work):</b>
<b>Email address:</b>	<b>Fax number:</b>
<b>Job title:</b>	
<b>Relevant experience</b>	
<b>Description of your current job:</b>	
<b>Previous work experience or attach copy of a current CV:</b>	
<b>Qualifications and training and/or attach copy of a current CV:</b>	

*continued overleaf...*

**Voluntary work/interests:**

**Name of employer/training provider/college:**

**Address:**

**Postcode:**

**Telephone number (work):**

**Fax number:**

**Email address:**

**Type of business, if employer:**

**Number of staff:**

**Structure of organisation (including chart or diagram if available):**

### Example form 3 – Contents checklist

SVQ title:		
Candidate:		
	<b>Completed?</b>	<b>Page/section number</b>
<b>Title page for the portfolio</b>		
<b>Personal profile</b> <ul style="list-style-type: none"> <li>• your own personal details</li> <li>• a brief CV or career profile</li> <li>• description of your job</li> <li>• information about your employer/training provider/college</li> </ul>		
<b>Summary of the units</b>		
<b>Completed units</b> <ul style="list-style-type: none"> <li>• signed by yourself, your assessor and the internal verifier (where relevant)</li> <li>• reference numbers included</li> <li>• unit assessment plans</li> </ul>		
<b>Unit progress records</b>		
<b>Index of evidence (with cross-referencing information completed)</b>		
<b>Evidence (with reference numbers)</b> <ul style="list-style-type: none"> <li>• observation records</li> <li>• details of witnesses (witness testimony sheets)</li> <li>• personal statements</li> </ul>		



### Example form 4 – Index of evidence

SVQ title and level: SVQ 2 in Business and Administration at SCQF Level 5

Candidate:

Units/elements evidence links to <i>(give specific numbers, eg 5.2.1)</i>	Evidence number	Description of evidence	Included in portfolio (Yes/No) <i>If No, state location</i>	Internal verifier signature and date of sampling



### Example form 5 – Unit assessment plan

SVQ title: SVQ 2 in Business and Administration at SCQF Level 5				
Unit:				
Candidate:			Assessor:	
<b>Normal working activities performed</b>				
	Typical evidence	Work area	Expected completion date	Links to other units/elements
Element:				
Element:				
Element:				
<b>Activities needing to be performed</b>				
Element:				
Element:				
Element:				
<b>Additional comments</b>				
Assessor's signature:			Date:	
Candidate's signature:			Date:	



**Example form 6 – Unit sign-off record**

SVQ title and level: SVQ 2 in Business and Administration at SCQF Level 5									
Candidate:									
Assessor:									
To achieve the whole qualification, you must prove competence in Xxx <b>mandatory</b> units and Xxx <b>optional</b> units. <b>Unit checklist:</b> list here the units you will be undertaking, then circle the reference number of each unit as you complete it.									
<b>Mandatory</b>									
<b>Optional</b>									

Mandatory units			
Unit number	Title	Assessor's signature	Date

*continued overleaf...*



**Example form 7 – Work Log**

<b>SVQ title and level: SVQ 2 in Business and Administration at SCQF Level 5</b>				
<b>Unit/element(s):</b>				
<b>Candidate:</b>				
<b>Purpose of statement:</b>				
<b>Evidence index number:</b>				
<b>Date</b>	<b>Evidence index number</b>	<b>Details of statement</b>	<b>Links to other evidence <i>(enter numbers)</i></b>	<b>Units, elements and PCs covered</b>
<b>Candidate's signature:</b>			<b>Date:</b>	
<b>Assessor's signature:</b>			<b>Date:</b>	



### Example form 8 – Observation record

SVQ title and level: SVQ 2 in Business and Administration at SCQF Level 5	
Unit/element(s):	
Candidate:	Date of observation:
Evidence index number:	
<b>Skills/activities observed:</b>	<b>PCs and range covered:</b>
<b>Knowledge and understanding apparent from this observation:</b>	
<b>Other units/elements to which this evidence may contribute:</b>	
<b>Assessor comments and feedback to candidate:</b>	
I can confirm the candidate's performance was satisfactory.	
<b>Assessor's signature:</b>	<b>Date:</b>
<b>Candidate's signature:</b>	<b>Date:</b>



### Example form 9 – Witness testimony

SVQ title and level: SVQ 2 in Business and Administration at SCQF Level 5	
Candidate name:	
Evidence index number:	
Where applicable, evidence number to which this testimony relates:	
Unit:	
Element(s):	
Range:	
Date of evidence:	
Witness name:	
Relationship to candidate:	
Details of testimony:	
I can confirm the candidate's evidence is authentic and accurate.	
Witness signature:	
Name:	Date:
Contact telephone number:	
<i>Please tick (✓) the appropriate box.</i>	
<input type="checkbox"/>	Qualified as an assessor for workplace performance
<input type="checkbox"/>	Familiar with the SVQ standards to which the candidate is working



## Example form 10 – Expert witness evidence record

SVQ title and level: SVQ 2 in Business and Administration at SCQF Level 5	
Candidate name:	
Evidence index number:	
Where applicable, evidence number to which this testimony relates:	
Unit:	
Element(s):	
Date of evidence:	
Expert witness name:	
Relationship to candidate:	
Details of testimony:	
I can confirm the candidate's evidence is authentic and accurate.	
Expert witness signature:	
Name:	Date:
Contact telephone number:	
<i>Please tick (✓) the appropriate box.</i>	
<input type="checkbox"/>	Qualified as an assessor for workplace performance
<input type="checkbox"/>	Relevant professional work role that involves evaluating everyday staff practice
<input type="checkbox"/>	Current expertise
<input type="checkbox"/>	Familiar with the SVQ standards to which the candidate is working



**Example form 11 – Record of questions and candidate’s answers**

<b>SVQ title and level: SVQ 2 in Business and Administration at SCQF Level 5</b>	
<b>Candidate name:</b>	
<b>Unit:</b>	<b>Element(s):</b>
<b>Evidence index number:</b>	
<b>Circumstances of assessment:</b>	
<b>List of questions and candidate’s responses:</b>	
Q:	
A:	
Q:	
A:	
<b>Assessor’s signature:</b>	<b>Date:</b>
<b>Candidate’s signature:</b>	<b>Date:</b>



## Section 3: Logbook

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(This must start on an odd page)

# Mandatory units



**Unit 1:** **Agree how to manage and improve own performance in a business environment**

**Unit code:** S201

**Unit credit:** 4

**Unit level:** 5

---

**Introduction**

Accept plans for own work and its delivery; improve own performance; and, behave in a way that encourages effective working.

**Specific skills:**

- Analysing
- Planning
- Communicating
- Presenting information
- Decision-making
- Problem-solving
- Organising

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>Element 1: Plan and be accountable for own work</b>		
A. The purpose of planning own work and being accountable to others		
B. How to agree realistic targets for own work and why this is important		
C. How to plan own work to meet agreed deadlines		
D. The types of problems that may occur during work and how to seek help if needed		
E. The purpose of keeping other people informed about progress		
F. The purpose and benefits of giving other people sufficient notice if revisions to plans are needed		
G. The benefits of acknowledging and learning from mistakes		
H. Guidelines, procedures and codes of practice that are relevant to own area of work		
I. The benefits of setting high standards for own work and how to set these standards		
<b>Element 2: Improve own performance</b>		
J. The benefits of trying to continuously improve own work		
K. The benefits of encouraging and accepting feedback from others		
L. How learning and development can help to improve own work, benefit the organisation and further own career		
M. The main career progression routes available		
N. Learning and development opportunities that are available		

Knowledge	Type of evidence	Date
<b>Element 3: Behave in a way that supports effective working</b>		
O. The purpose and benefits of being ready to take on new challenges and adapt to change		
P. The value of treating others with honesty, respect and consideration		
Q. The types of behaviour that show you are honest, respectful and considerate and the types of behaviour that show you are not		
R. How to help and support others and why this is important		

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
<b>Column key:</b>	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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I confirm that the candidate has achieved all the requirements of this Unit.

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

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Plan and be accountable for own work**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Agree realistic targets and achievable timescales for own work						
2. Plan how to make best use of time and the other resources needed						
3. Confirm working methods with work colleagues						
4. Follow the correct procedures to deal with problems when they arise, using the support of other people when necessary						
5. Keep other people informed of progress						
6. Meet deadlines or renegotiate timescales and plans in good time						
7. Take responsibility for own work and accept responsibility for any mistakes made						
8. Follow agreed guidelines, procedures and, where appropriate, codes of practice						
9. Set high standards for own work and show commitment to achieving these standards						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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**Element 2: Improve own performance**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
10. Encourage and accept feedback from other people						
11. Use feedback to agree ways to improve own work and put improvements into practice						
12. Agree where further learning and development could improve own performance						
13. Follow through a learning plan that meets own needs						
14. Review own progress and update own learning plan						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 3: Behave in a way that supports effective working**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
15. Understand your own needs and rights						
16. Show a willingness to take on new challenges						
17. Adapt readily to change						
18. Treat other people with honesty, respect and consideration						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



**Unit 2: Undertake work in a business environment**

**Unit code:** S202

**Unit credit:** 2

**Unit level:** 5

---

**Introduction**

Undertake the requirements for delivering sustainability; respect diversity; and, protect security and confidentiality in line with organisational requirements in a business environment.

**Specific skills:**

- Communicating
- Interpersonal skills
- Planning
- Reading

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>Element 1: Support sustainability</b>		
A. The benefits of minimising waste in the workplace		
B. The main causes of waste in a business administration environment		
C. How to minimise this waste		
D. Why recycling is important and the organisational procedures for recycling and disposal of hazardous materials		
E. How regular maintenance of equipment can help to minimise waste		
F. How to use technology to work more efficiently		
<b>Element 2: Support diversity</b>		
G. What is meant by diversity and why it should be valued		
H. How to be sensitive to people's individual needs and respect their abilities, background, values, customs and beliefs		
I. The ways in which it is possible to learn from others		
<b>Element 3: Maintain security and confidentiality</b>		
J. The purpose and benefits of maintaining security and confidentiality		
K. The legal and organisational requirements in relation to security and confidentiality		
L. The procedures to follow if there are any concerns about security and confidentiality		

**Additional evidence (if applicable):**

--

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Support sustainability**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Keep waste to a minimum						
2. Follow procedures for the recycling and disposal of hazardous materials						
3. Follow procedures for maintenance of equipment						
4. Make best use of available technology						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: Support diversity**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
5. Interact with other people in a way that is sensitive to their individual needs and respects their background, abilities, values, customs and beliefs						
6. Learn from other people and use this to improve own way of working and interacting with others						
7. Follow organisational procedures and legal requirements in relation to discrimination legislation						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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

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### Element 3: Maintain security and confidentiality

#### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
8. Maintain the security of property in a way that is consistent with organisational procedures and legal requirements						
9. Maintain the security and confidentiality of information in line with organisational procedures and legal requirements						
10. Report any concerns about security and confidentiality to an appropriate person						

#### Additional evidence (if applicable):

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Unit 3:** **Prepare to communicate in a business environment**

**Unit code:** S205

**Unit credit:** 3

**Unit level:** 5

---

**Introduction**

Prepare how to communicate in writing and verbally in a business environment.

**Specific skills:**

- Communicating
- Organising
- Planning
- Reflecting

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>Element 1: Plan communication</b>		
A. The reasons for identifying the purpose of communication and the audience		
B. Methods of communication and situations in which to use them		
<b>Element 2: Communicate in writing</b>		
C. Relevant sources of information		
D. How to use language appropriate to the audience, the chosen communication method and the purpose of the communication		
E. How to organise, structure and present information for the audience		
F. How to check the accuracy of information		
G. How to use grammar, punctuation and spelling accurately		
H. The principles of Plain English		
I. The reasons for proofreading or checking work		
J. How to recognise when work is urgent or important		
K. The organisational procedures for filing communications		
<b>Element 3: Communicate verbally</b>		
L. How to present information and ideas clearly		
M. Ways of contributing to discussions that will help to move them forward		
N. Methods of active listening		
O. The reasons for summarising communication		

Element 4: After communication	
P. How to seek feedback on whether the communication achieved its purpose	
Q. The value of reflecting on the outcomes of communication and of identifying ways to further develop communication skills	

**Additional evidence (if applicable):**

O = direct observation of the learner's performance by their assessor	PD = professional discussion
Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Plan communication**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1. Identify the purpose of the communication and the audience						
2. Decide which method of communication to use						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_

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## Element 2: Communicate in writing

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
3. Find and select information that supports the purpose of the communication						
4. Organise, structure and present information to suit the audience's needs and what you want to say						
5. Confirm and read written material that contains information that is needed						
6. Extract the main points needed from written material						
7. Use accurate grammar, punctuation and spelling						
8. Proofread or check work and make any necessary amendments						
9. Produce the communication to meet deadlines recognising the difference between what is important and what is urgent						
10. Keep a file copy of all communication						

**Additional evidence (if applicable):**

--

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

### Element 3: Communicate verbally

#### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
11. Present information and ideas clearly to others						
12. Make contributions to discussions that help to move the discussion forward						
13. Listen actively to information that other people are communicating and respond appropriately						
14. Ask relevant questions to clarify anything not understood						
15. Summarise the communication with the person/people being communicated with to make sure the meaning has been understood						

#### Additional evidence (if applicable):

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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**Element 4: After communication**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
16. Seek feedback on whether the communication achieved its purpose						
17. Reflect on the outcomes of communication and identify ways to develop communication skills further						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
Column key:	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



# Optional units

Leave blank

**Unit 4:** Plan how to solve business problems

**Unit code:** S203

**Unit credit:** 4

**Unit level:** 5

---

**Introduction**

Identify business problems and plan how to solve them.

**Specific skills:**

- Communicating
- Problem-solving
- Decision-making
- Working with others
- Organising
- Planning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. How to recognise when a business problem exists		
B. How to identify the potential causes of a business problem		
C. Problem-solving techniques		
D. Planning techniques		
E. Reasons for using support and feedback from others		
F. The value of checking progress and adjusting plans as necessary		
G. How to recognise when the business problem has been solved		
H. How to review the approach to solving the business problem		

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Element 1: Plan how to solve business problems

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Recognise when a business problem exists						
2. Confirm the business problem is understood						
3. Discuss the business problem with others						
4. Agree an approach to solving the business problem						
5. Plan the agreed approach to solving the business problem						
6. Decide how to recognise when the business problem has been solved						
7. Agree the plan with the appropriate authority						
8. Put the plan into action						
9. Use support and feedback from others when appropriate						
10. Check progress towards solving the business problem, adjusting the plan as necessary						
11. Review the approach to solving the business problem, identifying other approaches which may have been more productive						

**Additional evidence (if applicable):**

<p><b>Column key:</b></p>	<p><b>O = direct observation of the learner's performance by their assessor</b></p> <p><b>Q&amp;A = outcomes from oral or written questioning</b></p> <p><b>P = products of the learner's work</b></p> <p><b>RA = personal statements and/or reflective accounts</b></p> <p><b>S = outcome from simulation, where permitted by the assessment strategy</b></p>	<p><b>PD = professional discussion</b></p> <p><b>A = assignment, project/case studies</b></p> <p><b>WT = authentic statements/witness testimony</b></p> <p><b>EPW = expert witness testimony</b></p> <p><b>RPL = evidence of recognition of prior learning</b></p>
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I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## **Unit 5: Work with other people in a business environment**

**Unit code:** S204

**Unit credit:** 3

**Unit level:** 5

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### **Introduction**

Work within the organisation to present and promote a positive image of the organisation and work collaboratively with others to achieve the organisational goals and objectives.

### **Specific skills:**

- Communicating
- Problem-solving
- Managing time
- Resolving disagreement
- Negotiating
- Working with others
- Planning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Own responsibilities at work		
B. How own role fits into the organisation’s structure and contributes to its operation		
C. The policies, procedures, systems and values of the organisation that are relevant to own job role		
D. How to apply the organisation’s values and policies		
E. Who to consult if unsure about policies, objectives, systems and values		
F. The purpose of working with other people to achieve agreed goals and objectives		
G. The situations in which working with others can achieve positive outcomes		
H. The purpose of sharing work goals and plans when working with others		
I. Different methods of communication and when to use them		
J. When it is essential to communicate with others within the team		
K. The purpose of acknowledging the strengths of others and of balancing own abilities with theirs		
L. The value of diversity in teams		
M. The situations in which team members might need support		
N. The purpose and value of respecting others		
O. The purpose of agreeing quality measures		
P. The types of problems and disagreements that occur when working with others and how to resolve them within the limits of own authority		
Q. The purpose of giving and receiving constructive feedback		
R. How to make use of feedback to improve the work of others and the work of the team as a whole		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Work with other people in a business environment</b>
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**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Work in a way that supports the team's objectives						
2. Welcome opportunities to work with other people to achieve a positive outcome						
3. Share work goals and plan work objectives together						
4. Follow the policies, systems and procedures that are relevant to the role						
5. Put relevant organisational values into practice in all aspects of own work						
6. Work with outside organisations and individuals in a way that protects the image of the organisation						
7. Seek guidance from others when unsure about objectives, policies, systems, procedures and values						
8. Communicate with other people						
9. Work in a way that recognises the strengths of others within a team						
10. Provide support to members of a team						
11. Show respect for individuals						
12. Produce quality work on time						

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
13. Identify and refer problems and disagreements to relevant colleagues						
14. Share feedback with others on the achievement of objectives						

**Additional evidence (if applicable):**

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

Column key:

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



**Unit 6:** **Produce documents in a business environment**

**Unit code:** S211

**Unit credit:** 4

**Unit level:** 5

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**Introduction**

Produce high-quality, attractive documents to agreed specifications.

**Specific skills:**

- Checking
- Negotiating
- Designing
- Organising
- Listening
- Questioning
- Managing time
- Using technology

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The purpose and benefits of producing high-quality and attractive documents		
B. The different types of documents that may be designed and produced and document styles that could be used		
C. The different formats in which the text may be presented		
D. The purpose and benefits of agreeing the purpose, content, style, quality standards and deadline for production of the document		
E. The different types of technology available for inputting, formatting and editing text and their main features		
F. The types of resources needed to produce high-quality and attractive documents		
G. How to organise content needed for the document		
H. How to integrate and layout text and non-text objects		
I. How to check for accuracy and correctness - including spelling, grammar and punctuation - and the purpose of doing this		
J. The purpose of storing the document safely and securely and how to do so		
K. The purpose of confidentiality and data protection		
L. The purpose and benefits of meeting deadlines		

**Additional evidence (if applicable):**

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	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>A = assignment, project/case studies</b>
	<b>WT = authentic statements/witness testimony</b>
	<b>EPW = expert witness testimony</b>
	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Produce documents in a business environment**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Confirm the purpose, content, style and deadlines for the document						
2. Prepare the required resources						
3. Organise the required content						
4. Use available technology appropriate to the document being produced						
5. Produce the document in the agreed style						
6. Integrate non-text objects in the agreed layout, where required						
7. Check for accuracy, editing and correcting text as necessary						
8. Clarify document requirements, when necessary						
9. Store the document safely and securely in approved locations						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



## **Unit 7: Prepare text from notes**

**Unit code:** S212

**Unit credit:** 4

**Unit level:** 6

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### **Introduction**

Present accurate and correct text in an agreed format from notes.

### **Specific skills:**

- Checking
- Questioning
- Keyboarding skills
- Using technology
- Listening
- Managing time

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The different types of documents that may be produced from notes and the formats they should follow		
B. The difference between producing text from own notes and producing text from others' notes		
C. The benefits of agreeing the purpose, format and deadline for the text		
D. The purpose of accuracy when preparing text		
E. How to check for accuracy and correctness - including spelling, grammar and punctuation - and the purpose of doing this		
F. The purpose of storing text safely and securely and how to do so		
G. The purpose of confidentiality and data protection		
H. The purpose and benefits of meeting deadlines		

**Additional evidence (if applicable):**

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	O = direct observation of the learner's performance by their assessor	PD = professional discussion
<b>Column key:</b>	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

Prepare text from notes
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### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Agree the purpose, format and deadlines for the transcription						
2. Input the text using keyboarding skills						
3. Format the text, making efficient use of available technology						
4. Check content for accuracy, editing and correcting text						
5. Clarify text requirements when necessary						
6. Store the text and the original notes safely and securely in approved locations						
7. Present the text in the required format within agreed deadlines						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



**Unit 8:** Prepare text from notes using touch typing (40 wpm)

**Unit code:** S213

**Unit credit:** 3

**Unit level:** 5

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**Introduction**

Present accurate and correct text in an agreed format, from notes; touch typing at a speed of 40 words per minute.

**Specific skills:**

- Checking
- Using technology
- Listening
- Managing time
- Questioning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The different types of documents that may be produced from notes and the formats they should follow		
B. The difference between producing text from own notes and producing text from others' notes		
C. The benefits of agreeing the purpose, format and deadline for the text		
D. The purpose of accuracy when preparing text		
E. How to check for accuracy and correctness - including spelling, grammar and punctuation- and the purpose of doing this		
F. The purpose of storing text safely and securely and how to do so		
G. The purpose of confidentiality and data protection		
H. The purpose and benefits of meeting deadlines		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

Prepare text from notes: using touch typing (40 wpm)

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Agree the purpose, format and deadlines for the transcription						
2. Input the text using touch typing to 40 words per minute						
3. Format the text, making efficient use of available technology						
4. Check content for accuracy, editing and correcting text						
5. Clarify text requirements when necessary						
6. Store the text and the original notes safely and securely in approved locations						
7. Present the text in the required format within agreed deadlines						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



<b>Unit 9:</b>	<b>Prepare text from shorthand (60 wpm)</b>
<b>Unit code:</b>	S214
<b>Unit credit:</b>	8
<b>Unit level:</b>	5

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### **Introduction**

Take shorthand notes and produce accurate and correct text in an agreed format from these notes, at a minimum speed of 60 words per minute.

### **Specific skills:**

- Checking
- Questioning
- Listening
- Using technology
- Managing time
- Noting

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The different types of documents that may be produced from shorthand and the formats they should follow		
B. The benefits of agreeing the purpose, format and deadline for the text		
C. How to check for accuracy and correctness - including spelling, grammar and punctuation - and the purpose of doing this		
D. The purpose of storing text safely and securely and how to do so		
E. The purpose of storing the original shorthand notes safely and securely and how to do so		
F. The purpose of confidentiality and data protection		
G. The purpose and benefits of meeting deadlines		

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

Prepare text from shorthand (60 wpm)

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Agree the purpose, format and deadlines for the text						
2. Take dictation using shorthand at a minimum speed of 60 words per minute						
3. Clarify text requirements when necessary						
4. Input and format the text from shorthand notes						
5. Make efficient use of available technology						
6. Check content for accuracy, editing and correcting the text						
7. Store the text and the original shorthand notes safely and securely in approved locations						
8. Present the text in the required format within agreed deadlines						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Unit 10:</b>	<b>Prepare text from recorded audio instruction (40 wpm)</b>
<b>Unit code:</b>	S215
<b>Unit credit:</b>	4
<b>Unit level:</b>	5

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### **Introduction**

Transcribe accurate and correct text in an agreed format from an audio recording, at a minimum speed of 40 words per minute.

### **Specific skills:**

- Checking
- Using technology
- Listening
- Managing time
- Questioning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The different types of documents that may be produced from audio recordings and the formats they should follow		
B. The benefits of agreeing the purpose, format and deadline for the text		
C. How to check for accuracy and correctness - including spelling, grammar and punctuation- and the purpose for doing this		
D. The purpose of storing text safely and securely and how to do so		
E. The purpose of confidentiality and data protection		
F. The purpose and benefits of meeting deadlines		
G. The different types of technology available for playing back recordings and their main features		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

Prepare text from recorded audio instruction (40 wpm)

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Agree the purpose, format and deadlines for the transcription						
2. Input the text from the audio recording to a minimum speed of 40 words per minute						
3. Format the text, making efficient use of available technology						
4. Check content for accuracy, editing and correcting the text						
5. Clarify text requirements when necessary						
6. Store the text and the original recording safely and securely in approved locations						
7. Present the text in the required format within agreed deadlines						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



## **Unit 11: Support the organisation and co-ordination of events**

**Unit code:** S222

**Unit credit:** 5

**Unit level:** 5

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### **Introduction**

Support the organisation and co-ordination of an event including the identification of venues, production of event materials, supporting activities during the event and following up on activities after the event.

### **Specific skills:**

- Checking
- Managing resources
- Organising
- Communicating
- Managing time
- Planning
- Decision-making
- Monitoring
- Problem-solving
- Interpersonal skills
- Negotiating

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The role of an event organiser		
B. How to contribute to organising and co-ordinating event plans to meet the objectives of the brief		
C. Different types of events and their main features		
D. The types of risks associated with events and how to minimise these		
E. The types of information that delegates will need		
F. How to identify suitable venues for different types of events		
G. The types of resources needed to prepare for different types of events		
H. The special requirements that delegates may have and how to meet these		
I. Health, safety and security requirements when organising events		
J. The types of activities and resources that may need to be co-ordinated during an event		
K. The types of problems that may occur during events and how to deal with these		
L. Points to observe when clearing and vacating an event		
M. The types of follow-up activities that may be required to carry out		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

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Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

### Element 1: Before the event

#### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Support the implementation of the plan for the event to meet agreed objectives						
2. Contribute to identifying and agreeing resources and support needed for the event						
3. Identify and cost suitable venues						
4. Liaise with the venue to confirm event requirements						
5. Follow all legal and contractual requirements						
6. Follow the relevant health, safety and security requirements for the event						
7. Support production of event materials						
8. Prepare and send out invitations to delegates						
9. Co-ordinate delegate responses						
10. Provide delegates with joining instructions and event materials						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: At the event**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

<b>Performance</b>	<b>Type of evidence</b>	<b>Portfolio Reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio Reference</b>	<b>Date</b>
<b>To meet the national standard you must:</b>						
11. Prepare the venue as required						
12. Support activities and resources during the event, in line with agreed plans						
13. Help delegates to feel welcome						
14. Respond to delegates' needs throughout the event						
15. Follow the correct procedures when there are problems during the event						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 3: After the event**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
16. Clear and vacate the venue, in accordance with terms of the contract						
17. Conduct follow-up activities, as required						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Unit 12:</b>	<b>Support the organisation of business travel or accommodation</b>
<b>Unit code:</b>	S223
<b>Unit credit:</b>	3
<b>Unit level:</b>	5

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### **Introduction**

Support the organisation of business travel or accommodation arrangements.

### **Specific skills:**

- Communicating
- Managing time
- Problem-solving
- Checking
- Negotiating
- Researching
- Decision-making
- Organising
- Evaluating
- Planning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The purpose of confirming the brief and budget for travel or accommodation		
B. How to support the organisation of business travel or accommodation to meet expectations		
C. The main types of business travel or accommodation arrangements that may need to be made and the procedures to follow		
D. The sources of information and facilities that are used to make business travel or accommodation arrangements		
E. How to obtain best value for money when making business travel or accommodation arrangements		
F. How to keep records of business travel or accommodation arrangements		
G. The documents and information to provide to the person who is travelling and how to obtain these		
H. The types of problems that may occur with travel or accommodation arrangements and the correct procedures to follow in order to deal with these problems		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

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Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Support the organisation of business travel or accommodation**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Confirm business travel or accommodation and budget requirements from the organiser						
2. Check draft itinerary and schedule with the traveller						
3. Research and book business travel arrangements or accommodation as agreed, obtaining best value for money						
4. Obtain and collate documents and information for business travel or accommodation						
5. Maintain records of business travel or accommodation and store any confidential information securely, including financial records						
6. Follow arrangements for payment facilities for business travel or accommodation						
7. Follow the correct procedures when there are problems with business travel or accommodation arrangements						
8. Provide the traveller with an itinerary, documents and information in good time						
9. Confirm with the organiser or traveller(s) that itinerary, documents and information meet requirements						

**Additional evidence (if applicable):**

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	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



## **Unit 13: Support the organisation of meetings**

**Unit code:** S224

**Unit credit:** 4

**Unit level:** 5

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### **Introduction**

Support the planning and operational requirements of the agreed brief for a meeting.

### **Specific skills:**

- Communicating
- Managing resources
- Planning
- Checking
- Managing time
- Problem-solving
- Evaluating
- Negotiating
- Interpersonal skills
- Organising

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. How to help plan meetings to meet agreed aims and objectives		
B. The different types of meetings and their main features and purposes		
C. The purpose and benefits of following the agreed brief for the meeting		
D. The role of the person helping to organise the meeting		
E. How to identify suitable venues for different types of meetings		
F. The types of resources needed for different types of meetings		
G. Health, safety and security requirements when organising meetings		
H. The types of information that attendees will need		
I. Any special requirements that attendees may have and how to meet them		
J. How to help the meeting organiser during the meeting		
K. Organisational procedures for clearing and vacating a meeting room		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

### Element 1: Before the meeting

#### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Follow requirements of the meeting brief						
2. Follow agreed procedures to obtain an appropriate venue and catering requirements, if required, for the meeting						
3. Prepare required papers for the meeting						
4. Invite attendees and confirm attendance						
5. Make sure attendees' needs are met						
6. Collate and dispatch papers for the meeting within agreed timescales						
7. Check equipment and layout of room meets meeting brief						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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**Element 2: During the meeting**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
8. Attend to any requirements during the meeting as directed by the meeting organiser						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
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**Element 3: After the meeting**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
9. Clear and vacate the meeting venue according to requirements						
10. Circulate the meeting record to agreed timescales						
11. Contribute to the evaluation of the meeting						
12. Maintain a record of external services, where used						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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<b>Unit 14:</b>	<b>Use electronic message systems</b>
<b>Unit code:</b>	S206
<b>Unit credit:</b>	1
<b>Unit level:</b>	5

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### **Introduction**

Use electronic message systems to deliver and receive messages.

### **Specific skills:**

- Communicating
- Checking
- Organising

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The main types of electronic message systems and their key features		
B. The different features of message systems and how to use them		
C. The purpose of keeping a message system up to date		
D. How to check a message system for messages		
E. The information to be given when taking or leaving messages		
F. When to delete or discard messages		
G. The purpose of leaving clear messages for others		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

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I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Use electronic message systems**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Keep the message system up to date						
2. Check the system for messages						
3. Respond to messages within agreed timescales						
4. Delete messages when they have been dealt with						
5. Leave clear recorded messages on other people's systems						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



## **Unit 15: Use a diary system**

**Unit code:** S207

**Unit credit:** 3

**Unit level:** 5

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### **Introduction**

Make, update and co-ordinate appointments in a diary system making sure entries are accurately and clearly made.

### **Specific skills:**

- Communicating
- Organising
- Planning
- Problem-solving

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The purpose of using diary systems to plan and co-ordinate activities and resources		
B. The different types of diary systems		
C. The purpose of obtaining relevant information about requested diary entries and changes		
D. The types of information you must obtain		
E. The purpose of keeping the system up to date		
F. How to prioritise requests		
G. The purpose of prioritising requests		
H. The purpose of trying to balance the needs of all those involved		
I. The purpose of communicating changes to those affected		
J. The different types of problems that may occur when new requests are made and solutions to these problems		
K. The purpose of identifying security and confidentiality issues when operating a diary system		

**Additional evidence (if applicable):**

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<b>Column key:</b>	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
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I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

Use a diary system
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### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Obtain the information needed to make requested diary entries						
2. Make diary entries accurately and clearly						
3. Prioritise requested changes						
4. Identify the implications of any changes for existing entries						
5. Record agreed changes in the diary						
6. Communicate agreed changes to those affected						
7. Solve problems by negotiating alternative arrangements						
8. Keep the diary up to date and store it securely						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
<b>Column key:</b>	P = products of the learner's work	WT = authentic statements/witness testimony
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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



## **Unit 16:** **Take minutes**

**Unit code:** S208

**Unit credit:** 4

**Unit level:** 5

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### **Introduction**

Produce accurate records of discussions and decisions taken (action logging) during meetings.

### **Specific skills:**

- Communicating
- Planning
- Evaluating
- Interpersonal skills
- Organising

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The role of meetings		
B. Legal and organisational requirements that may apply to taking minutes		
C. The purpose and benefits of minutes as an accurate record of discussions and decisions		
D. Documents that are commonly used in meetings: agendas, minutes, matters arising, action sheets etc.		
E. The role of the meeting chair and other formal responsibilities within a meeting		
F. How to work in partnership with the chair when taking minutes		
G. How to listen effectively		
H. How to take notes during discussions		
I. The purpose of clarifying points you are unsure about		
J. Different types of minutes		
K. Different writing styles that are used in taking minutes		
L. How to sort, select and structure information to produce minutes		
M. Correct tone and use of professional language in minutes		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Take minutes</b>
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### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Prepare for the meeting as required						
2. Note any changes to the agenda, matters arising and action points from the last meeting						
3. Take notes at the meeting of all those aspects required by the organisation and, where appropriate, by law						
4. Produce accurate minutes that record the meaning of discussions and the decisions taken						
5. Make sure the minutes are in the agreed style						
6. Make sure the process for signing off minutes and action points has been agreed						
7. Check the work and make necessary amendments						
8. Agree the minutes with relevant people and circulate within specified timescales						
9. Observe all requirements for confidentiality and sensitivity in line with organisational policy						
10. Make sure follow-up actions, and who is responsible for taking follow-up actions, have been clearly identified						
11. Store the minutes, following organisational procedures						

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



**Unit 17:** **Handle mail**

**Unit code:** S209

**Unit credit:** 3

**Unit level:** 5

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**Introduction**

Organise the distribution and collection of incoming and outgoing mail or packages and provide specialised mail services.

**Specific skills:**

- Checking
- Decision-making
- Prioritising
- Problem-solving

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The purpose of distributing and dispatching mail to the correct recipient within agreed timescales		
B. The organisational structure and names, roles and locations of individuals and teams		
C. The organisational procedures for dealing with different types of mail		
D. The range of internal and external mail services available and how to choose the most appropriate service		
E. Organisational security procedures for handling mail or packages		
F. Approved courier services and how to make use of these		
G. Methods of calculating postage charges for mail or packages, e.g. franking, stamping, using on-line postage system		
H. The types of problems that may occur with incoming and outgoing mail and how to deal with these		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Incoming Mail**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Receive and check incoming mail or packages						
2. Sort incoming mail or packages						
3. Dispose of unwanted 'junk' mail						
4. Follow correct procedures for suspicious or damaged items						
5. Distribute incoming mail or packages						
6. Follow the correct procedures when there are problems with incoming mail						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Element 2: Outgoing Mail

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
7. Collect and sort outgoing mail or packages						
8. Identify best options for dispatching mail						
9. Arrange for courier service to collect outgoing mail or packages where requested						
10. Prepare items for urgent or special delivery						
11. Calculate correct postage charges for outgoing mail or packages						
12. Record postage costs in line with agreed procedures						
13. Dispatch outgoing mail or packages on time						
14. Follow the correct procedures when there are problems with outgoing mail						

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

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<b>Unit 18:</b>	<b>Provide reception services</b>
<b>Unit code:</b>	S210
<b>Unit credit:</b>	3
<b>Unit level:</b>	5

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## **Introduction**

Maintain a reception to enhance the vision and brand of the organisation.

## **Specific skills:**

- Communicating
- Negotiating
- Problem-solving
- Decision-making
- Organising
- Questioning
- Interpersonal skills
- Personal presentation
- Listening
- Planning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The purpose and value of the receptionist function as the first point of contact between the public/client and the organisation		
B. How to present a positive image of self and the organisation		
C. The organisation's structure and lines of communication		
D. The purpose of confidentiality guidelines		
E. How to implement confidentiality guidelines		
F. The purpose of entry and security procedures		
G. How to implement entry and security procedures		
H. The purpose of health and safety procedures		
I. How to implement health and safety procedures		
J. How to contribute ideas for improving the reception area in terms of accessibility, functionality and environment, security and safety and facilities for visitors		
K. The organisational emergency procedures and your role within them		
L. Why additional duties are carried out during quiet periods, if they arise		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Provide reception services</b>
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### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Present a positive image of self and the organisation						
2. Provide individuals with requested information and other information which may be useful to them, within guidelines on confidentiality						
3. Implement the correct entry and security procedures						
4. Follow the relevant health and safety procedures						
5. Refer any issues that cannot be dealt with personally to the appropriate person						
6. Maintain the reception area to give a positive impression of the organisation						
7. Suggest ideas for improving the reception area						
8. Follow organisational procedures in the event of an accident or emergency						
9. Carry out additional duties during quiet periods, if they arise						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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<b>Unit 19:</b>	<b>Meet and welcome visitors</b>
<b>Unit code:</b>	S250
<b>Unit credit:</b>	3
<b>Unit level:</b>	5

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### **Introduction**

Meet and welcome visitors ensuring visitors' needs are met while presenting a positive image of the organisation.

- Specific skills:
- Communicating
- Personal presentation
- Decision-making
- Problem-solving
- Interpersonal skills
- Listening

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The purpose of dealing with visitors promptly and making them feel welcome		
B. The organisational procedures for receiving and dealing with visitors, including security		
C. The typical range of visitors to the premises and their needs		
D. The purpose of presenting a positive image of self and the organisation		
E. How to respond to any individual needs the visitor may have (for example, accessibility)		
F. The purpose of health and safety and security procedures and own responsibilities for health, safety and security		
G. Organisation structures and communication channels within the organisation		
H. The purpose and value of communication with visitors		
I. How to deal with challenging behaviour from visitors calmly and in line with organisational procedures		
J. The types of problems that may occur with visitors - including conflict and aggression - and how to deal with these		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Meet and welcome visitors</b>
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### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Meet and greet visitors promptly, treating them politely and making them feel welcome						
2. Identify visitors and the reason for their visit						
3. Use the organisation's systems to receive and record visitors, as appropriate						
4. Make sure visitors' needs are met						
5. Explain to visitors reasons for any delay in dealing with them, and keep them informed of developments						
6. Present a positive image of yourself and your organisation						
7. Follow organisational, health, safety and security procedures						
8. Inform relevant people about visitors' arrival promptly						
9. Deal with any problems that may occur, or refer these to an appropriate colleague						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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## **Unit 20: Organise and report data**

**Unit code:** S216

**Unit credit:** 3

**Unit level:** 5

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### **Introduction**

Collate, organise and report data in agreed format and timescale.

### **Specific skills:**

- Communicating
- Planning
- Checking
- Presenting information
- Decision-making
- Problem-solving
- Organising
- Using technology

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The different ways of organising data that has been found from research		
B. The different ways of presenting data for analysis		
C. The purpose of presenting data to the agreed format and timescale		
D. The purpose of getting feedback on data that has been found from research		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Organise and report data</b>
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**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Collate and organise data in a way that will help analysis						
2. Check the accuracy of data and make adjustments, if required						
3. Present data that has been found from research in the agreed format and timescale						
4. Get feedback on the data that has been found from research, if necessary						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



## **Unit 21: Research information**

**Unit code:** S217

**Unit credit:** 4

**Unit level:** 5

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### **Introduction**

Research information, identifying sources of information researched and record the data that has been extracted from the sources of information.

### **Specific skills:**

- Analysing
- Planning
- Using technology
- Communicating
- Presenting information
- Decision-making
- Problem-solving
- Organising
- Researching

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The purpose and benefits of researching information to achieve objectives		
B. The types of information to be obtained for analysis		
C. How to identify sources of information		
D. How to agree sources of information		
E. The different techniques to search for relevant information		
F. What constitutes relevant, valid and reliable data		
G. The purpose of maintaining a record of sources of information used		
H. How to make a record of sources of information used		
I. How to obtain feedback on the results of researching information		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

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Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Research information</b>
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### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Agree aims, objectives and deadlines for the information search						
2. Identify sources of information required for research						
3. Search for and obtain information						
4. Check information is suitable for the purpose of the research						
5. Meet deadlines for completing research						
6. Identify and select relevant, valid and reliable data						
7. Record the data and store it securely						
8. Make a record of information sources used						
9. Get feedback on what has been researched, if necessary						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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<b>Unit 22:</b>	<b>Store and retrieve information</b>
<b>Unit code:</b>	S218
<b>Unit credit:</b>	3
<b>Unit level:</b>	5

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### **Introduction**

Process, store, and retrieve information using different information systems, in line with organisational requirements.

### **Specific skills:**

- Communicating
- Using technology
- Organising
- Planning
- Problem-solving

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The purpose of storing and retrieving required information		
B. The different information systems and their main features		
C. Legal and organisational requirements covering the security and confidentiality of information		
D. The purpose of confirming information to be collected, stored and retrieved		
E. The methods that can be used to collect required information		
F. The procedures to be followed to access information systems		
G. The types of information to be deleted		
H. The procedures for identifying and deleting information and why they must be followed		
I. How to make sure information is accurate		
J. The problems that occur with information systems and who to report them to		
K. The purpose of providing information in the required format and within agreed timescales		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

### Element 1: Processing information

#### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Identify and collect required information						
2. Follow agreed procedures and legislation to maintain security and confidentiality						
3. Store required information in approved locations to the agreed deadlines						
4. Update information, as required						
5. Follow agreed procedures for deleting information						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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## Element 2: Retrieve information

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
6. Confirm information for retrieval						
7. Comply with procedures and legislation for accessing an information system						
8. Locate and retrieve the required information						
9. Follow the correct procedures when there are problems with information systems						
10. Provide information in the agreed format and within agreed timescales						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## **Unit 23: Provide archive services**

**Unit code:** S219

**Unit credit:** 2

**Unit level:** 5

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### **Introduction**

Archive and retrieve information to the agreed brief and in line with organisational requirements.

### **Specific skills:**

- Communicating
- Using technology
- Organising
- Planning
- Problem-solving

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The purpose of archiving required information		
B. Legal and organisational requirements covering security and confidentiality of information to be archived		
C. The purpose of deciding and agreeing information to be archived		
D. The procedures to be followed to access archive information systems		
E. The purpose of recording archived information		
F. The purpose of archiving information within agreed timescales		
G. When information should be archived and procedures should followed		
H. Procedures for the retention of archived information		
I. Procedures for retrieving archived information		
J. Procedures for deleting archived information		
K. The problems that occur with archive systems and who to report them to		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Provide archive services</b>
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### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Identify and agree on the information to be archived						
2. Identify and agree on the retention period for information being archived						
3. Archive information to the agreed brief and within agreed timescales						
4. Follow requirements of external archive systems, if outsourced from the organisation						
5. Archive information to comply with organisational policies and procedures and legislation requirements						
6. Maintain and update a record of archived information						
7. Retrieve archived information on request						
8. Follow agreed procedures for deleting information from the archive system to comply with organisational policies and procedures and legislation requirements, if required						
9. Resolve or refer problems that occur with the archive systems						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



**Unit 24:** Support the management and development of an information system

**Unit code:** S226

**Unit credit:** 7

**Unit level:** 7

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**Introduction**

Support the management and evaluation of an information system to meet organisational and users' needs.

**Specific skills:**

- Analysing
- Monitoring
- Problem-solving
- Developing others
- Negotiating
- Researching
- Evaluating
- Organising
- Using technology
- Managing resources
- Planning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The purpose and benefits of identifying and agreeing user needs for an information system and developing specifications based on these		
B. The benefits of training users of the information system and of providing ongoing support		
C. The benefits of monitoring the use of information systems using available methods		
D. The purpose of maintaining and updating the information system and the methods you can use		
E. The types of problems that occur with information systems and how to deal with them		
F. How to identify and analyse problems and develop a strategy to solve them		
G. The benefits of continuously improving information systems		
H. Legislation and organisational requirements covering data protection and freedom of information		
I. The different ways of evaluating information systems		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Support the management and development of an information system

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Contribute to the provision of training and ongoing support to users						
2. Confirm management structures are in place to identify, analyse and resolve problems with the information system						
3. Monitor own use of an information system						
4. Follow legal and organisational requirements for handling information						
5. Make sure the information system is maintained and updated to meet users' needs, within the limits of own authority						
6. Confirm that all requirements for relevant legislation are followed						
7. Collect feedback on performance of information systems						
8. Contribute to the evaluation of feedback and prioritise development needs						
9. Contribute information to enable further system development						
10. Identify and report problems when they occur						
11. Resolve problems within the limits of own authority						

Additional evidence (if applicable):

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
Column key:	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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## **Unit 25: Use office equipment**

**Unit code:** S220

**Unit credit:** 3

**Unit level:** 5

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### **Introduction**

Use a range of office equipment (such as photocopiers, faxes, binders, laminators, printers or PCs) applying the necessary standards of health and safety and operating practice.

### **Specific skills:**

- Communicating
- Using technology
- Organising
- Planning
- Problem-solving

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The different types of office equipment, their features and what they can be used for		
B. How to choose equipment and resources that are appropriate for the task		
C. The reasons for following manufacturers' and organisational instructions when operating equipment		
D. How to use different types of office equipment safely		
E. The reasons for keeping waste to a minimum and how to do so		
F. The reasons for keeping equipment clean and hygienic		
G. The reasons for following manufacturers' instructions and organisational procedures when dealing with equipment faults		
H. The types of equipment and resource faults you are likely to experience and the correct way of dealing with these		
I. The purpose of meeting work standards and deadlines		
J. The purpose of leaving equipment, resources and work area ready for the next user to agree requirements		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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<b>Use office equipment</b>
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### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Locate and select the equipment and resources needed for the task						
2. Follow manufacturer's, organisational operating instructions and health and safety requirements for different equipment						
3. Waste as few resources as possible						
4. Keep the equipment clean and hygienic						
5. Deal with equipment and resource problems according to manufacturer's and organisational procedures						
6. Report problems you cannot deal with personally to the appropriate colleague						
7. Make sure the final work product meets the agreed requirements						
8. Produce the work product within agreed timescales						
9. Make sure the equipment, resources and work area are ready for the next user						

**Additional evidence (if applicable):**

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**Unit 26:** **Maintain and issue stationery stock items**

**Unit code:** S221

**Unit credit:** 3

**Unit level:** 5

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**Introduction**

Maintain, order, check and issue stationery stock items from external or internal suppliers.

**Specific skills:**

- Auditing
- Reporting
- Checking
- Communicating
- Recording

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The requirements for ordering, taking delivery, storing, stock-taking, issuing and disposing of stationary stock items		
B. The types of problems that may occur with deliveries and stationary stock items and how to deal with these correctly		
C. Methods of keeping up-to-date, accurate and legible records of stationary stock items		
D. The current level of demand for stationary stock items and factors which may affect future levels of demand		
E. How to handle and store stationary stock items safely and securely		
F. The different suppliers to order from		
G. Any differences in the way stationary stock items are ordered from internal and external suppliers		
H. Organisational procedures for issuing stationary stock items		
I. The circumstances in which receipts may be required for stationary stock items issued		
J. How to recommend improvements to systems		
K. Correct procedures for safe disposal of unwanted or damaged stationary stock items		

**Additional evidence (if applicable):**

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### Element 1: Maintain stationery stock levels

#### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Maintain stationery stock items to required levels						
2. Handle and store stationery stock safely and securely, maintaining its condition						
3. Follow relevant organisational procedures						
4. Carry out stock-takes, as instructed, and report problems						
5. Order stationery stocks from suppliers						
6. Chase-up orders with suppliers						
7. Check incoming deliveries against orders and report any problems						
8. Keep up-to-date, accurate and legible records of stationery stocks delivered and held						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: Issue stationery stock items**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
9. Issue stationery stock items as requested, following organisational procedures						
10. Keep up-to-date, accurate and legible records of stationery stock items issued						
11. Dispose of unwanted or damaged stationery stock items safely, following organisational procedures and legal requirements						
12. Identify and recommend ways in which the system for receiving and issuing stationery stock could be improved						

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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**Unit 27:** **Respond to change in a business environment**

**Unit code:** S225

**Unit credit:** 3

**Unit level:** 5

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**Introduction**

Consider coping strategies when faced with change within a business environment.

**Specific skills:**

- Analysing
- Problem-solving
- Communicating
- Questioning
- Listening
- Negotiating

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The reasons for change and the pace of change in organisations		
B. The psychological impact of change on people in the workplace		
C. Own role in facilitating change at work		
D. The purpose and value of planning for change		
E. How to adapt to change in own work role		
F. How to evaluate the likely impact of change in the workplace		
G. The value of seeing change as an opportunity to the business, the organisation, the team and self		
H. The types of support mechanisms that people need during change processes at work		
I. The benefits of good communication and accurate information during change processes at work		
J. How to put change at work into perspective		
K. Strategies to cope with change or to learn how to control the way change affects own area of work		
L. The way the values of the organisation interact with own personal values		
M. How to evaluate the effect of change on people, processes and outcomes		

**Additional evidence (if applicable):**

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**Respond to change in a business environment**

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Assist the change process within own area of work						
2. Contribute to plans for change						
3. Adapt realistically to change						
4. Identify support mechanisms for self and colleagues during the change process						
5. Support others during change						
6. Ask questions to clarify aspects of the change process when unsure						
7. Contribute to the evaluation of the change						

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## **Unit 28: Administer HR records**

**Unit code:** S227

**Unit credit:** 3

**Unit level:** 5

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### **Introduction**

This standard is about the work a Human Resources administrator undertakes when dealing with employee records.

### **Specific skills:**

- Accuracy
- Evaluating
- Quality checking
- Analysing
- Managing time
- Recording
- Attention to detail
- Organising
- Researching
- Communicating
- Problem solving

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>Element 1: Create personnel files for new starters</b>		
A. The systems, procedures and software used by the organisation for Human Resource records and how to use it to open a new personnel file		
B. The information that should be entered in a new personnel file and how to do this, including: name, address, next of kin, date employment commenced, proof of eligibility to work in the UK, offer letter, references, contract of employment, job description/person specification, equal opportunities monitoring data		
<b>Element 2 : Maintain Human Resource information</b>		
C. How to enter and update HR information, including information on: terms and conditions of employment, employment benefits, pay, pension, sick leave, maternity/paternity leave, holiday, other leave of absence, induction and results of review following any probationary period, performance management, training and development, promotion or other changes to terms and conditions of employment, disciplinary or grievance issues, staff exit		
D. The information that should be held for members of staff and the action to take if this is incomplete		
<b>Element 3: Report Human Resource information</b>		
E. The types of reports that may be requested		
F. How to produce reports from individual or multiple Human Resource files		

Knowledge	Type of evidence	Date
<b>Element 4: Comply with organisational and legal requirements</b>		
G The current legislation that applies when dealing with Human Resource records		
H What the limits of your responsibility are, and to whom matters outside your responsibility should be referred		
I The data protection principles that apply to personnel records (e.g. requirement to file sickness certificates separately from the personnel file)		
J Organisational policy and procedure for removal of out-of-date information		
K Organisational policy and procedure for archiving information		
L Organisational procedures for confidentiality and security of Human Resource records		
M The purpose of confidentiality and security of Human Resource information and the potential consequences of a breach of confidentiality or security		

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Create personnel files for new starters**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Open a new personnel file						
2. Record required information about the employee						
3. File documents relevant to the employee						
4. Process monitoring data, as appropriate						
5. Check that information and documents are complete, requesting missing information and documents, when necessary						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Element 2: Maintain Human Resource information

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
6. Keep required personnel information up-to-date						
7. Maintain records of: <ul style="list-style-type: none"> <li>• performance management and development</li> <li>• holiday, sickness and other leave</li> <li>• disciplinary and grievance</li> <li>• exit process</li> </ul>						
8. Process and file relevant correspondence and documentation Report Human Resource information						

**Additional evidence (if applicable):**

--	--

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
<b>Column key:</b>	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 3: Report Human Resource information**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
9. Provide as requested						
<ul style="list-style-type: none"> <li>• information from individual personnel files</li> <li>• management information reports</li> </ul>						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 4: Comply with organisational and legal requirements**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
10. Comply with organisational and legal requirements for confidentiality, freedom of information, data protection and security of information						
11. Remove out-of-date information in line with organisational policy and procedures						
12. Archive relevant information in line with current legislation and organisational policy and procedures						

Additional evidence (if applicable):

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
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I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## **Unit 29: Administer the recruitment and selection process**

**Unit code:** S228

**Unit credit:** 4

**Unit level:** 5

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### **Introduction**

This standard is about a Human Resources administrator assisting with the recruitment and selection process.

### **Specific skills:**

- Accuracy
- Evaluating
- Problem solving
- Prioritising
- Analysing
- Managing time
- Quality checking
- Attention to detail
- Organising
- Recording
- Communicating
- Presenting yourself
- Researching

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>Element 1: Advertise job vacancies</b>		
A. Organisational policies, procedures and constraints that affect your area of responsibility		
B. Procedures to identify and process personnel requirements in the organisation: who is involved and what do they do?		
C. Ways in which personnel requirements are expressed (e.g. job descriptions and person specifications) and how to interpret these		
D. The current legislation that applies when you are dealing with recruitment and selection		
E. What the limits of your responsibility are, and to whom matters outside your responsibility should be referred		
F. The types of information to include in a job advertisement and legal/organisational requirements that affect this		
G. How to place advertisements in different locations (e.g. press, website)		
H. How to liaise with recruitment agencies		
<b>Element 2 : Respond to potential applicants</b>		
I. The types of information that should be in an application pack		
J. The types of queries that applicants may have and how to respond to them		
K. How to keep records of responses received and their purpose		

Knowledge	Type of evidence	Date
<b>Element 3: Administer the selection process</b>		
L. The procedures used to shortlist applicants: who is involved and what do they do?		
M. Procedures and methods for contacting shortlisted candidates to invite them to participate in the selection process (e.g. by phone, letter, e-mail)		
N. How to process feedback for unsuccessful applicants		
O. Different types of selection processes that may be used (e.g. interview, assessment centre) and how they work		
P. The selection processes used in your organisation and your role in those		
Q. The administrative support needed for different types of selection processes		
R. Procedures for obtaining the resources needed for selection processes (e.g. booking rooms and refreshments)		
S. The different types of documents used for selection processes (e.g. interview schedules, question proformas, recording documentation, tests used in assessment centres)		
T. The purpose of giving candidates a favourable impression of the organisation		
U. The range of records that must be kept following the selection process and the purpose of following organisational procedures		
<b>Element 4: Administer the appointment process</b>		
V. The range of pre-employment checks (e.g. CRB checks, reference checks) that might be required and how to carry these out		
W. How to format offer letters and employment contracts		
X. The purpose of confidentiality and security of record keeping		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Advertise job vacancies**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Confirm personnel requirements with the responsible people						
2. Confirm the information that will appear in job advertisements						
3. Confirm how the vacancy will be advertised						
4. Advertise the vacancy as agreed						
5. Liaise with any relevant agencies to confirm details of job vacancies making sure that they understand the requirements of the organisation						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: Respond to potential applicants**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
6. Send out application packs or other information to potential applicants on request						
7. Respond appropriately to queries from potential applicants						
8. Maintain records of responses received						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

### Element 3: Administer the selection process

#### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
9. Collate applications and make these available to those involved in selection						
10. Invite shortlisted candidates to take part in the selection process						
11. Process feedback for unsuccessful applicants						
12. Keep records of responses from shortlisted candidates						
13. Provide appropriate support for the selection process						
14. Help to make sure candidates have a positive impression of the organisation						
15. Keep records of the outcomes of the selection process						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

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Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 4: Administer the appointment process**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
16. Carry out appropriate pre-employment checks						
17. Format and send out offer letters and employment contracts						
18. Maintain records of the recruitment and selection process in line with current legislation and organisational requirements						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Unit 30:</b>	<b>Administer parking dispensations</b>
<b>Unit code:</b>	S251
<b>Unit credit:</b>	4
<b>Unit level:</b>	5

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### **Introduction**

Provide administrative services for the issue of parking dispensations, including permits, season tickets, suspensions, dispensations/waivers and blue badges.

### **Specific skills:**

- Accuracy
- Evaluating
- Presenting yourself
- Researching
- Analysing
- Managing time
- Problem solving
- Using technology
- Communicating
- Monitoring
- Quality checking
- Decision-making
- Organising
- Recording

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The services that you are responsible for and the limits and scope of your responsibilities and authority in providing these services		
B. Your organisation's policies, procedures and constraints that affect services in your area of responsibility and how to apply them		
C. The current legislation, Traffic Regulation Orders and other regulations that apply		
D. The requirements of the Data Protection Act and its implications for your role		
E. The criteria, policy and procedures in relation to permits, season tickets, suspensions, dispensations / waivers and blue badges		
F. The range of checks that are relevant to applications and how and when to carry them out		
G. Your organisation's anti-fraud policies and procedures and how to operate them		
H. The specialist software used by your organisation for the issue of permits, season tickets, suspensions, dispensations / waivers and blue badges and how to use it		
I. The evidence required to support an application for a permit, season tickets, suspension, dispensation / waiver or blue badge		
J. Understanding of payment and refund processing within your organisation		
K. How to communicate effectively with customers and other relevant departments		
L. The importance of the audit trail of controlled stationary		
M. How to update and maintain records as necessary		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Element 1: Receive and process applications

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Advise customers on criteria for eligibility						
2. Review applications and supporting evidence against published criteria						
3. Seek additional evidence from the customer if required						
4. Carry out relevant checks in accordance with organisational procedures						
5. Where necessary, seek opinions from appropriate medical professionals						
6. Handle supporting documentation securely and in line with current legislation or relevant terms and conditions						
7. Make a decision to approve or decline the application						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Element 2: Issue documentation

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
8. Communicate the decision to the customer, return documentation where necessary and issue appropriate paperwork						
9. Maintain appropriate records including renewals						
10. Process payments and handle refunds in line with organisational procedures						
11. Communicate the decision or information to other relevant departments						

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## **Unit 31: Bespoke software 2**

**Unit code:** S236a

**Unit credit:** 3

**Unit level:** 5

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### **Introduction**

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. This standard is imported from the e-skills IT Users suite.

### **Specific skills:**

- Checking
- Communicating
- Presenting information
- Using technology

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Describe what functions to apply to structure and layout information effectively		

**Additional evidence (if applicable):**

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	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
<b>Column key:</b>	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Input and combine information using bespoke applications**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Input relevant information accurately so that it is ready for processing						
2. Select and use appropriate techniques to link and combine information of different forms or from different sources within the software						
3. Respond appropriately to data entry error messages						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: Use appropriate structures to organise and retrieve information efficiently**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
4. Select and use appropriate structures and/or layouts to organise information						
5. Apply local and/or legal guidelines and conventions for the storage and use of data where available						

**Additional evidence (if applicable):**

**Column key:**

**O = direct observation of the learner's performance by their assessor**

**PD = professional discussion**

	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 3: Use the functions of the software effectively to process and present information**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
6. Select and use appropriate tools and techniques to edit, process and format information						
7. Check information meets needs, using IT tools and making corrections as necessary						
8. Select and use appropriate methods to present information						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



## **Unit 32: Specialist software 2**

**Unit code:** S236b

**Unit credit:** 3

**Unit level:** 5

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### **Introduction**

Select and use a wide range of intermediate specialist 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. This standard is imported from the e-skills IT Users suite.

### **Specific skills:**

- Checking
- Communicating
- Presenting information
- Using technology

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Describe what functions to apply to structure and layout information effectively		

**Additional evidence (if applicable):**

--

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Input and combine information using specialist applications**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Input relevant information accurately so that it is ready for processing						
2. Select and use appropriate techniques to link and combine information of different forms or from different sources within the software						
3. Respond appropriately to data entry error messages						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: Use appropriate structures to organise and retrieve information efficiently**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
4. Select and use appropriate structures and/or layouts to organise information						
5. Apply local and/or legal guidelines and conventions for the storage and use of data where available						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 3: Use the functions of the software effectively to process and present information**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
6. Select and use appropriate tools and techniques to edit, process and format information						
7. Check information meets needs, using IT tools and making corrections as necessary						
8. Select and use appropriate methods to present information						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



## **Unit 33: Data management software 2**

**Unit code:** S237

**Unit credit:** 3

**Unit level:** 5

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### **Introduction**

An intermediate user can 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. This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Analysing
- Presenting information
- Checking
- Using technology
- Organising
- Planning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Describe the risks to data security and procedures used for data protection		
B Identify what queries and reports need to be run to output the required information		

**Additional evidence (if applicable):**

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O = direct observation of the learner's performance by their assessor	PD = professional discussion
Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
P = products of the learner's work	WT = authentic statements/witness testimony
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S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

Column key:

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Enter, edit and maintain data records in a data management system**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Enter data accurately into groups of records to meet requirements						
2. Locate and amend data associated with groups of records						
3. Check data records meet needs, using IT tools and making corrections as necessary						
4. Respond appropriately to data entry and other error messages						
5. Apply local and/or legal guidelines for the storage and use of data where available						

**Additional evidence (if applicable):**

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<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

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I confirm that the candidate has achieved all the requirements of this Unit.

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

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I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: Retrieve and display data records to meet requirements**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
6. Select and use queries to search for and retrieve information to meet given requirements						
7. Create and view reports to output information from the system to meet given requirements						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## **Unit 34: Database software 2**

**Unit code:** S238

**Unit credit:** 4

**Unit level:** 5

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### **Introduction**

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.

Also, create and modify single table, non-relational databases. Any aspects that are unfamiliar may require support and advice from others. This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Analysing
- Presenting information
- Checking
- Using technology
- Organising
- Planning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Identify the components of a database design		
B. Describe the field characteristics for the data required		
C. Describe ways to maintain data integrity		

### Additional evidence (if applicable):

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	O = direct observation of the learner's performance by their assessor	PD = professional discussion
Column key:	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Create and modify non-relational database tables**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Create and modify database tables using a range of field types						
2. Respond appropriately to problems with database tables						
3. Use database tools and techniques to ensure data integrity is maintained						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: Enter, edit and organise structured information in a database**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
4. Create forms to enter, edit and organise data in a database						
5. Select and use appropriate tools and techniques to format data entry forms						
6. Check data entry meets needs, using IT tools and making corrections as necessary						
7. Respond appropriately to data entry errors						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 3: Use database software tools to run queries and produce reports**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
8. Create and run database queries using multiple criteria to display or amend selected data						
9. Plan and produce database reports from a single table non-relational database						
10. Select and use appropriate tools and techniques to format database reports						
11. Check reports meet needs, using IT tools and making corrections as necessary						

Additional evidence (if applicable):

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Unit 35:</b>	<b>Improving productivity using IT 2</b>
<b>Unit code:</b>	S239
<b>Unit credit:</b>	3
<b>Unit level:</b>	4

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### **Introduction**

Plan and review the 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, the individual will be able to devise solutions to use IT tools to improve productivity. Any aspect that is unfamiliar will require support and advice from other people. This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Checking
- Negotiating
- Using technology
- Evaluating
- Organising
- Managing resources
- Planning
- Monitoring
- Problem solving

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Describe the purpose for using IT		
B. Describe the methods, skills and resources required to complete the task successfully		
C. Describe any factors that may affect the task		
D. Describe how the purpose and outcomes have been met by the chosen IT systems and software applications		
E. Describe any legal or local guidelines or constraints that may apply to the task or activity		
F. Describe whether the IT tools selected were appropriate for the task and purpose		
G. Assess the strengths and weaknesses of final work		
H. Describe ways to make further improvements to work		
I. Review the benefits and drawbacks of IT tools and systems used, in terms of productivity and efficiency		
J. Describe ways to improve productivity and efficiency		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Plan, select and use appropriate IT systems and software for different purposes**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Plan how to carry out tasks using IT to achieve the required purpose and outcome						
2. Select and use IT systems and software applications to complete planned tasks and produce effective outcomes						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: Review and adapt the ongoing use of IT tools and systems to make sure that activities are successful**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
3. Review ongoing use of IT tools and techniques and change the approach as needed						
4. Review outcomes to make sure they match requirements and are fit for purpose						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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**Element 3: Develop and test solutions to improve the ongoing use of IT tools and systems**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
5. Develop solutions to improve own productivity in using IT						
6. Test solutions to ensure that they work as intended						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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## **Unit 36: IT security for users 2**

**Unit code:** S240

**Unit credit:** 2

**Unit level:** 5

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### **Introduction**

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). This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Checking
- Negotiating
- Using technology
- Evaluating
- Organising
- Managing resources
- Planning
- Monitoring
- Problem solving



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	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Select and use appropriate methods to minimise security risk to IT systems and data**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Apply a range of security precautions to protect IT systems and data						
2. Keep information secure and manage personal access to information sources securely						
3. Apply guidelines and procedures for the secure use of IT						
4. Select and use effective backup procedures for systems and data						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

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I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## **Unit 37: Presentation software 2**

**Unit code:** S241

**Unit credit:** 4

**Unit level:** 5

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### **Introduction**

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. This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Communicating
- Planning
- Evaluating
- Presenting information
- Managing time
- Using technology
- Organising

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Identify what types of information are required for the presentation		
B. Identify any constraints which may affect the presentation		
C. Identify what slide structure and themes to use		
D. Identify what presentation effects to use to enhance the presentation		
E. Describe how to present slides to meet needs and communicate effectively		

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Input and combine text and other information within presentation slides**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Enter text and other information using layouts appropriate to type of information						
2. Insert charts and tables into presentation slides						
3. Insert images, video or sound to enhance the presentation						
4. Organise and combine information of different forms or from different sources for presentations						
5. Store and retrieve presentation files effectively, in line with local guidelines and conventions where available						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

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

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**Element 2: Use presentation software tools to structure, edit and format slide sequences**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
6. Select, change and use appropriate templates for slides						
7. Select and use appropriate techniques to edit slides and presentations to meet needs						
8. Select and use appropriate techniques to format slides and presentations						
9. Select and use animation and transition effects appropriately to enhance slide sequences						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

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**Element 3: Prepare slideshow for presentation**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
10. Prepare slideshow for presentation						
11. Check presentation meets needs, using IT tools and making corrections as necessary						
12. Identify and respond to any quality problems with presentations to ensure that presentations meet needs						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Describe what IT system components, storage and peripheral devices are needed		
B. Describe any health and safety issues associated with setting up an IT system		
C. Describe the characteristics of IT systems that affect performance		
D. Describe the factors that affect data transfer		
E. Identify the login and password details needed to connect to an Internet Service Provider (ISP)		
F. Describe what security precautions need to be addressed		
G. Identify what tests can be used to check the IT system and communications		
H. Identify the help and troubleshooting facilities available to solve problems		

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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**Element 1: Select and connect up a personal computer safely with associated hardware and storage media to meet needs**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Select and connect up the components of an IT system safely, including any peripheral devices and storage media						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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**Element 2: Select and connect an IT system to a communication service to meet needs**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
2. Select and connect communication hardware safely to an IT system						
3. Select and connect to a communication service from an IT system						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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**Element 3: Install and configure software for use**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
4. Configure the user interface to meet needs						
5. Set up and configure virus protection software						
6. Install and set up application software to meet needs						
7. Backup and restore system and data files						

**Additional evidence (if applicable):**

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	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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**Element 4: Check that the IT system and communication service are working successfully**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
8. Select and run suitable tests to make sure that the system and communication service are working successfully						
9. Respond to faults and error messages and use help and troubleshooting facilities to determine and take appropriate action						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
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## **Unit 39: Spreadsheet software 2**

**Unit code:** S243

**Unit credit:** 4

**Unit level:** 5

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### **Introduction**

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. This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Checking
- Communicating
- Presenting information
- Using technology



	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
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Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Use a spreadsheet to enter, edit and organise numerical and other data**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Enter and edit numerical and other data accurately						
2. Combine and link data across worksheets						
3. Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: Select and use appropriate formulas and data analysis tools to meet requirements**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
4. Select and use a range of appropriate functions and formulas to meet calculation requirements						
5. Use a range of tools and techniques to analyse and manipulate data to meet requirements						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

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**Element 3: Select and use tools and techniques to present and format spreadsheet information**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
6. Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets						
7. Select and format an appropriate chart or graph type to display selected information						
8. Select and use appropriate page layout to present and print spreadsheet information						
9. Check information meets needs, using spreadsheet tools and making corrections as necessary						
10. Respond appropriately to any problems with spreadsheets						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



<b>Unit 40:</b>	<b>Using collaborative technologies 2</b>
<b>Unit code:</b>	S244
<b>Unit credit:</b>	4
<b>Unit level:</b>	5

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### **Introduction**

Facilitate the use of appropriate combinations of IT tool 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.

Any aspect that is unfamiliar may require support and advice from others. This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Communicating
- Presenting information
- Using technology

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Explain what risks there may be in using collaborative technology and how to keep them to a minimum		
B. Describe the purposes for using collaborative technologies		
C. Describe what outcomes are needed from collaborative working and whether or not archiving is required		
D. Describe the roles, IT tools and facilities needed for collaborative tasks and communication media		
E. Describe the features, benefits and limitations of different collaborative technology tools and devices		
F. Describe the compatibility issues in different combinations of collaborative tools and devices		
G. Describe what access rights and issues others may have in using collaborative technologies		
H. Assess what permissions are needed for different users and content		
I. Describe rules of engagement for using collaborative technologies		
J. Assess when there is a problem with collaborative technologies and when to get expert help		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Stay safe and secure when working with collaborative technology**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Take appropriate steps to avoid risks when working with collaborative technology, in line with relevant guidelines						
2. Use appropriate methods to promote trust when working collaboratively						
3. Carry out appropriate checks on others' online identities and different types of information						
4. Identify and respond to inappropriate content and behaviour						

**Additional evidence (if applicable):**

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	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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**Element 2: Plan and set up IT tools and devices for collaborative working**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
5. Select an appropriate combination of IT tools and devices to carry out collaborative tasks						
6. Connect and configure the combination of IT tools and devices needed for a collaborative task						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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**Element 3: Prepare collaborative technologies for use**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
7. Set up and use access rights to enable others to access information						
8. Set up and use permissions to filter information						
9. Adjust settings so that others can access IT tools and devices for collaborative working						
10. Select and use different elements to control environments for collaborative technologies						
11. Select and join networks and data feeds to manage data to suit collaborative tasks						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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**Element 4: Contribute to tasks using collaborative technologies**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
12. Enable others to contribute responsibly to collaborative tasks						
13. Present relevant and valuable information						
14. Moderate the use of collaborative technologies						
15. Archive the outcome of collaborative working						
16. Respond to problems with collaborative technologies						

**Additional evidence (if applicable):**

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## **Unit 41: Website software 2**

**Unit code:** S245

**Unit credit:** 4

**Unit level:** 5

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### **Introduction**

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. This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Communicating
- Planning
- Evaluating
- Presenting information
- Managing time
- Using technology
- Organising

### What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Describe what website content and layout will be needed for each page		
B. Describe how copyright and other constraints may affect the website		
C. Describe what access issues may need to be taken into account		
D. Describe what file types to use for saving content		
E. Identify any quality problems with websites and how to respond to them		

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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**Element 1: Create structures and styles for websites**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Plan and create web page templates to layout						
2. Select and use website features and structures to help the user navigate round web pages within the site						
3. Create, select and use styles to keep the appearance of web pages consistent and make them easy to understand						
4. Store and retrieve files effectively, in line with local guidelines and conventions where available						

**Additional evidence (if applicable):**

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**Element 2: Use website software tools to prepare content for websites**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
5. Prepare content for web pages so that it is ready for editing and formatting						
6. Organise and combine information needed for web pages including across different software						
7. Select and use appropriate editing and formatting techniques to aid both clarity and navigation						
8. Select and use appropriate development techniques to link information across pages						
9. Change the file formats appropriately for content						
10. Check web pages meet needs, using IT tools and making corrections as necessary						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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### Element 3: Publish websites

#### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
11. Select and use appropriate testing methods to check that all elements of websites are working as planned						
12. Select and use an appropriate programme to upload and publish the website						
13. Respond appropriately to problems with multiple page websites						

#### Additional evidence (if applicable):

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Column key:	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
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<b>Unit 42:</b>	<b>Word processing software 2</b>
<b>Unit code:</b>	S246
<b>Unit credit:</b>	4
<b>Unit level:</b>	5

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### **Introduction**

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. This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Checking
- Communicating
- Presenting information
- Using technology



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**Element 1: Enter and combine text and other information accurately within word processing documents**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Use appropriate techniques to enter text and other information accurately and efficiently						
2. Select and use appropriate templates for different purposes						
3. Select and use a range of editing tools to amend document content						
4. Combine or merge information within a document from a range of sources						
5. Store and retrieve document and template files effectively, in line with local guidelines and conventions where available						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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**Element 2: Create and modify appropriate layouts, structures and styles for word processing documents**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
6. Create, use and modify columns, tables and forms to organise information						
7. Select and apply styles to text						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
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**Element 3: Use word processing software tools and techniques to format and present documents effectively to meet requirements**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
8. Select and use appropriate techniques to format characters and paragraphs						
9. Select and use appropriate page and section layouts to present and print multipage and multi-section documents						
10. Check documents meet needs, using IT tools and making corrections as necessary						
11. Respond appropriately to any quality problems with documents to ensure that outcomes meet needs and are fit for purpose						

**Additional evidence (if applicable):**

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## **Unit 43: Using e-mail 2**

**Unit code:** S252

**Unit credit:** 3

**Unit level:** 5

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### **Introduction**

Understand and use a range of basic e-mail software tools to send, receive and store messages for straightforward or routine activities. Any aspect that is unfamiliar will require support and advice from others. This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Communicating
- Presenting information
- Using technology

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Determine the message size and how it can be reduced		
B. Describe how to stay safe and respect others when using e-mail		
C. Describe how to archive e-mail messages, including attachments		

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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**Element 1: Using e-mail software tools and techniques to compose and send messages**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Select and use software tools to compose and format e-mail messages, including attachments						
2. Send e-mail messages to individuals and groups						
3. Use an address book to organise contact information						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
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**Element 2: Manage incoming email effectively**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
4. Follow guidelines and procedures for using e-mail						
5. Read and respond to e-mail messages appropriately						
6. Organise, store and archive e-mail messages effectively						
7. Respond appropriately to e-mail problems						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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## **Unit 44:**

## **Control payroll**

**Unit code:**

S247

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### **Introduction**

Control the accuracy and compliance of the payroll. This standard is imported from the FSSC Accountancy and Finance suite.

### **Specific skills:**

- Checking
- Managing time
- Communicating
- Using technology
- Monitoring
- Problem Solving

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>Element 1: The Statutory Framework</b>		
A. Legislation relating to payroll processing and data protection;		
B. The regulations of the relevant tax authority in respect of income tax and national insurance liability on pay, expenses and benefits;		
C. National insurance regulations concerning directors;		
D. Income tax and national insurance regulations relating to termination, lump sum and “out of sync” payments;		
E. Legislation controlling attachments of earnings and the rules applying to how they interact with each other;		
F. Types of exceptional payment;		
G. Types of attachments to earnings;		
H. Types of termination payments.		
<b>Element 2: The Organisation</b>		
I. The organisation’s policies for recording and storing data;		
J. Organisational, external agency and employee requirements for information;		
K. The organisation’s procedures for maintaining the security and confidentiality of information;		
L. Sources of information for resolving discrepancies.		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
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	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

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Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Control Payroll

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Correctly identify the treatment of all allowances and enhancements with respect to tax, national insurance and pensions deductions;						
2. Update rates for permanent and temporary payments and deductions against agreed scales for each type of employee affected;						
3. Reconcile the national insurance liability for directors against the national insurance actually paid;						
4. Monitor compliance with attachments of earnings legislation;						
5. Correctly code and reconcile total charges to organisational budgets against aggregate payroll totals;						
6. Promptly reconcile the number of no pays and actual pays with the number of employees on the payroll;						
7. Calculate and reconcile aggregate payroll totals, including aggregate statutory payments and non-statutory deductions, against authorised control totals;						
8. Calculate and reconcile aggregate amounts payable to, or recoverable from, statutory and non-statutory bodies against control totals;						

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
9. Reconcile payroll records with the organisation's financial reports;						
10. Make payments to statutory and non-statutory bodies by the required deadline, accompanied by the applicable documentation and in accordance with organisational regulations and procedures;						
11. Check that individuals raising queries are authorised to receive the information they are requesting;						
12. Seek clarification or additional information from employees or managers where the nature of their queries is not clear;						
13. Present accurate information extracted from the payroll system in an appropriate format;						
14. Deal effectively with enquiries from statutory agencies and non-statutory bodies;						
15. Obtain employee authorisation where required prior to the release of information;						
16. Supply information within the specified timescale and in compliance with relevant legislation;						
17. File copies of responses in a logical and orderly manner in accordance with statutory and organisational requirements.						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Unit 45:

## Account for income and expenditure

Unit code:

S248

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### Introduction

Understand an organisation's accounting processes and identify and correct or refer any errors or discrepancies as well as maintain security and confidentiality of information at all times. This standard is imported from the **FSSC Accountancy and Finance suite**.

### Specific skills:

- Checking
- Managing time
- Communicating
- Using technology
- Monitoring
- Problem Solving

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>Element 1: The Business Environment</b>		
A. Types of business transactions and the documents involved;		
B. The general principles of VAT;		
C. Relevant bank services and the operation of the bank clearing system;		
D. The function and form of banking documentation		
<b>Element 2: Accounting Techniques, Principles and Theory</b>		
E. Capital and revenue expenditure;		
F. How to identify different types of errors;		
G. How to make adjustments to correct errors and write off bad debts;		
H. Methods of posting from books of prime entry to ledger accounts;		
I. Double entry bookkeeping and balancing accounts;		
J. The inter-relationship of accounts and the double entry system;		
K. The use of journals;		
L. How to identify discrepancies through control account reconciliation;		
M. The function and form of a trial balance;		
N. How to rectify imbalances and adjust errors not requiring a suspense account;		
O. The purpose and function of a suspense account;		
P. How to rectify imbalances by creating and then subsequently clearing a suspense account.		

Knowledge	Type of evidence	Date
<b>Element 3: The Organisation</b>		
Q. The organisation's accounting, administrative and filing systems and procedures;		
R. The nature of the organisation's business transactions;		

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
<b>Column key:</b>	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Account for income and expenditure

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Record details from the relevant primary records in the cashbook and ledgers						
2. Correctly calculate totals and balances of receipts and payments						
3. Compare individual items on the bank statement and in the cashbook for accuracy and identify discrepancies						
4. Prepare a bank reconciliation statement that illustrates any discrepancies						
5. Make and record authorised adjustments;						
6. Balance relevant accounts in the main ledger						
7. Reconcile control accounts with the totals of the balance in the subsidiary ledger accounts						
8. Reconcile the petty cash book with cash in hand and subsidiary records						
9. Identify discrepancies arising from the reconciliation of control accounts and either resolve them or refer to the appropriate person						
10. Draft a trial balance and open a suspense account to record any imbalance where necessary						

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
11. Identify reasons for imbalance, rectify them and make accurate corrections in the journal						

Additional evidence (if applicable):

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	O = direct observation of the learner's performance by their assessor
	PD = professional discussion
	Q&A = outcomes from oral or written questioning
	A = assignment, project/case studies
	P = products of the learner's work
	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts
	EPW = expert witness testimony
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



## **Unit 46:**

## **Draft financial statements**

**Unit code:**

S249

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### **Introduction**

Draft financial statements of incorporated organisations following the preparation of an initial trial balance. This standard is imported from the **FSSC Accountancy and Finance suite**.

### **Specific skills:**

- Checking
- Managing time
- Communicating
- Using technology
- Monitoring
- Problem Solving

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>Element 1: The Business Environment</b>		
A. The elements and purposes of financial statements of the organisation;		
B. The statutory form of financial statements and disclosure requirements;		
C. Relevant accounting standards;		
D. The obligations of directors or other responsible parties in respect of financial statements;		
E. The forms of equity, reserves and loan capital;		
F. The presentation of business taxation in financial statements;		
G. The audit needs and threshold relating to accounts;		
H. The differences between the published accounts and financial statements of different types of organisations.		
<b>Element 2: Accounting Techniques, Principles and Theory</b>		
I. Generally accepted accounting principles and concepts;		
J. The types of financial statements and how to prepare them in the proper form;		
K. The elements of financial statements;		
L. The types of relationship between the elements of financial statements;		
M. How to calculate and interpret accounting ratios and analyse the information contained in financial statements;		
N. The concept of group accounts and the general principles of consolidation		

**Additional evidence (if applicable):**

<p><b>Column key:</b></p>	<p><b>O = direct observation of the learner's performance by their assessor</b></p> <p><b>Q&amp;A = outcomes from oral or written questioning</b></p> <p><b>P = products of the learner's work</b></p> <p><b>RA = personal statements and/or reflective accounts</b></p> <p><b>S = outcome from simulation, where permitted by the assessment strategy</b></p>	<p><b>PD = professional discussion</b></p> <p><b>A = assignment, project/case studies</b></p> <p><b>WT = authentic statements/witness testimony</b></p> <p><b>EPW = expert witness testimony</b></p> <p><b>RPL = evidence of recognition of prior learning</b></p>
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Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Draft Financial Statements

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Identify the users of financial accounting information and financial statements						
2. Identify the general purpose, elements and relationships between the elements of financial statements						
3. Use appropriate information to draft financial statements in the appropriate form and in compliance with relevant accounting standards and domestic legislation and with the organisation's policies, regulations and procedures						
4. Correctly identify and implement subsequent adjustments						
5. Identify discrepancies, unusual features or queries and either resolve them or refer to the appropriate person						
6. Prepare simple consolidated accounts						
7. Prepare and interpret a cash flow statement						
8. Interpret financial statements using ratio analysis						
9. Draw valid conclusions from the information contained within financial statements						
10. Present issues, interpretations and conclusions clearly to the appropriate people.						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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## **Unit 47: Contribute to running a project**

**Unit code:** S324

**Unit credit:** 5

**Unit level:** 6

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### **Introduction**

Contribute to project planning and support the implementation and monitoring of projects to achieve planned outcomes.

### **Specific skills:**

- Application of number
- Managing resources
- Planning
- Analysing
- Managing time
- Prioritising
- Communicating
- Monitoring
- Problem-solving
- Evaluating
- Organising

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The purpose and benefits of identifying stakeholders involved in the project		
B. The difference between managing operations and managing projects		
C. The advantages and disadvantages of using projects and when projects are appropriate		
D. The benefits of defining a project's purpose, scope, timescale, costs, aims and objectives		
E. How to estimate types and quantity of resources needed for project activities		
F. The project-planning methodologies appropriate to the types of projects run and tools that can be used to assist project planning and control		
G. Different types of methods available to monitor projects		
H. Different ways of communicating with those involved in or affected by a project to make sure it runs smoothly		
I. The benefits of being flexible and adapting project plans when necessary		
J. How to record project activities		
K. The purpose of interim reporting		
L. The purpose and value of achieving projects within agreed timescales		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

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**Element 1: Contribute to project planning**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Identify all stakeholders involved in the project						
2. Confirm the purpose of the project with all relevant stakeholders						
3. Confirm the project scope, timescale, aims and objectives						
4. Contribute to the preparation of a project specification						
5. Confirm the resources needed for the project						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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## Element 2: Run the project

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
6. Implement and monitor the project to meet the agreed budget and timescales						
7. Communicate with all those involved in or affected by the project						
8. Seek advice in response to unexpected events						
9. Keep records of all project activity in the agreed format						
10. Provide interim reports on project progress						
11. Achieve required outcomes on time and to budget						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Unit 48:** **Design and produce documents in a business environment**

**Unit code:** S311

**Unit credit:** 4

**Unit level:** 6

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**Introduction**

Design and produce high-quality, attractive documents to agreed specifications.

**Specific skills:**

- Checking
- Negotiating
- Using technology
- Designing
- Organising
- Listening
- Questioning
- Managing time
- Researching

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The purpose and benefits of producing high-quality and attractive documents		
B. The different types of documents that you may be asked to design and produce and the document styles that should be used		
C. The different formats in which the text may be presented		
D. The benefits of agreeing the purpose, content, style, quality standards and deadline for the production of the document		
E. The different types of technology available for inputting, formatting and editing text and their main features		
F. The types of resources needed to produce high-quality and attractive documents		
G. How to research and organise the content needed for the document		
H. How to integrate and layout text and non-text objects		
I. How to check for accuracy and correctness - including spelling and grammar - and the purpose for doing this		
J. The purpose of storing the document safely and securely and how to do so		
K. The purpose of confidentiality and data protection		
L. The purpose and benefits of meeting deadlines		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Design and produce documents in a business environment

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Agree the purpose, content, style, quality standards and deadlines for the document						
2. Identify and prepare the resources needed						
3. Research and organise the content needed						
4. Make appropriate and efficient use of available technology						
5. Design and produce the document in the agreed style						
6. Integrate non-text objects in the agreed layout						
7. Check for accuracy, editing and correcting as necessary						
8. Store the document safely and securely in approved locations						
9. Clarify document requirements, when necessary						
10. Present the text in the required format within agreed deadlines						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



**Unit 49: Prepare text from notes using touch typing (60 wpm)**

**Unit code:** S312

**Unit credit:** 4

**Unit level:** 6

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**Introduction**

Present accurate and correct text in an agreed format, from notes, using touch typing at a speed of 60 words per minute.

**Specific skills:**

- Checking
- Using technology
- Listening
- Managing time
- Questioning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The different types of documents that may be produced from notes and the formats they should follow		
B. The difference between producing text from own notes and producing text from others' notes		
C. The benefits of agreeing the purpose, format and deadline for the text		
D. Why accuracy is important when preparing text		
E. How to check for accuracy and correctness - including spelling, grammar and punctuation- and the purpose of doing this		
F. The purpose of storing text safely and securely and how to do so		
G. The purpose of confidentiality and data protection		
H. The purpose and benefits of meeting deadlines		

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
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Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

Prepare text from notes using touch typing (60 wpm)

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Agree the purpose, format and deadlines for the transcription						
2. Input text using touch typing to 60 words per minute						
3. Format the text, making efficient use of available technology						
4. Check content for accuracy, editing and correcting text when necessary						
5. Clarify text requirements when necessary						
6. Store text and original notes safely and securely in approved locations						
7. Present text in the required format within agreed deadlines						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Unit 50:</b>	<b>Prepare text from shorthand (80 wpm)</b>
<b>Unit code:</b>	S313
<b>Unit credit:</b>	8
<b>Unit level:</b>	6

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### **Introduction**

Take shorthand notes and produce accurate and correct text in an agreed format from these notes, at a minimum speed of 80 words per minute.

### **Specific skills:**

- Checking
- Questioning
- Listening
- Using technology
- Managing time
- Noting

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The different types of documents that may be produced from shorthand and the formats they should follow		
B. The benefits of agreeing the purpose, format and deadline for the text		
C. How to check for accuracy and correctness - including spelling, grammar and punctuation - and the purpose of doing this		
D. The purpose of storing text safely and securely and how to do so		
E. The purpose of storing the original shorthand notes safely and securely and how to do so		
F. The purpose of confidentiality and data protection		
G. The purpose and benefits of meeting deadlines		

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

Prepare text from shorthand (80 wpm)

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1. Agree the purpose, format and deadlines for the text						
2. Take dictation using shorthand at a minimum speed of 80 words per minute						
3. Clarify text requirements when necessary						
4. Input and format the text from shorthand notes						
5. Make efficient use of available technology						
6. Check content for accuracy, editing and correcting the text						
7. Store the text and the original shorthand notes safely and securely in approved locations						
8. Present the text in the required format within agreed deadlines						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Unit 51:</b>	<b>Prepare text from recorded audio instruction (60wpm)</b>
<b>Unit code:</b>	S314
<b>Unit credit:</b>	4
<b>Unit level:</b>	6

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### **Introduction**

Transcribe accurate and correct text in an agreed format from an audio recording, at a minimum speed of 60 words per minute.

### **Specific skills:**

- Checking
- Using technology
- Listening
- Managing time
- Questioning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
For the whole unit		
A. The different types of documents that may be produced from audio recordings and the formats they should follow		
B. The benefits of agreeing the purpose, format and deadline for the text		
C. How to check for accuracy and correctness - including spelling, grammar and punctuation- and the purpose of doing this		
D. The purpose of storing text safely and securely and how to do so		
E. The purpose of confidentiality and data protection		
F. The purpose and benefits of meeting deadlines		
G. The different types of technology available for playing back recordings and their main features		

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

Prepare text from recorded audio instruction (60 wpm)

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1. Agree the purpose, format and deadlines for the transcription						
2. Input the text from the audio recording at a minimum speed of 60 words per minute						
3. Format the text, making efficient use of available technology						
4. Check content for accuracy, editing and correcting the text						
5. Clarify text requirements when necessary						
6. Store the text and the original recording safely and securely in approved locations						
7. Present the text in the required format within agreed deadlines						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Unit 52:</b>	<b>Organise and co-ordinate events</b>
<b>Unit code:</b>	S319
<b>Unit credit:</b>	8
<b>Unit level:</b>	6

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### **Introduction**

Agree a brief and budget for organising an event and decide the operational activities and technical requirements to deliver the event.

### **Specific skills:**

- Checking
- Interpersonal skills
- Monitoring
- Problem-solving
- Communicating
- Leading
- Negotiating
- Decision-making
- Managing resources
- Organising
- Evaluating
- Managing time
- Planning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The role of an event organiser		
B. How to plan and manage events to meet the objectives of the brief		
C. The different types of events and their main features		
D. The purpose and value of agreeing a brief and budget for the event		
E. The types of risks associated with events and how to minimise these		
F. How to develop a contingency plan for an event		
G. The types of information that delegates will need		
H. How to identify suitable venues for different types of events		
I. The types of resources needed for different types of events		
J. The special requirements that delegates may have and how to meet these		
K. Health, safety and security requirements when organising events		
L. The relevant legal and organisational requirements for contracts		
M. The types of activities and resources that may need to be co-ordinated during an event		
N. The types of problems that may occur during events and how to solve them		
O. What points to observe when clearing and vacating an event		
P. The purpose and value of evaluating an event and the methods you can use		
Q. The types of papers that may need to be circulated after an event		
R. Budgetary responsibilities and procedures		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Element 1: Before the event

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Agree the event brief and budget						
2. Agree a plan for the event which will meet agreed objectives and address identified risks and contingencies						
3. Identify and agree the resources and support needed for the event						
4. Identify and cost suitable venues						
5. Make sure all relevant legal and contractual requirements are correctly addressed						
6. Make sure the event complies with relevant health, safety and security requirements						
7. Liaise with the venue to confirm event requirements						
8. Make sure invitations are sent out to delegates						
9. Manage resources and the production of event materials						
10. Manage delegate responses						
11. Prepare joining instructions and event materials to be sent to delegates						
12. Make arrangements for rehearsals, if required, to make sure that the event runs smoothly						

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
13. Make sure all those involved are briefed and trained to fulfil their roles						
14. Delegate functions to the event team as appropriate						

**Additional evidence (if applicable):**

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

Column key:

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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Element 2: At the event

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
15. Prepare the venue and make sure all necessary resources are in place						
16. Co-ordinate activities and resources during the event, in line with agreed plans						
17. Help delegates to feel welcome						
18. Respond to delegates' needs throughout the event						
19. Resolve problems in a timely manner						
20. Oversee the work of key staff during the event						
21. Monitor compliance with relevant health, safety and security requirements						
22. Liaise with venue management to make sure facility resources are in place						

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

### Element 3: After the event

#### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
23. Clear and vacate the venue, in accordance with the terms of the contract						
24. Prepare and circulate papers or conduct other follow-up activities, if necessary						
25. Reconcile accounts to budget						
26. Seek and collect feedback from those involved in the event						
27. Analyse the feedback and share the analysis with relevant people						
28. Agree key learning points and use these to improve the running of future events						

**Additional evidence (if applicable):**

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	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



## **Unit 53: Plan and organise meetings**

**Unit code:** S320

**Unit credit:** 5

**Unit level:** 6

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### **Introduction**

Plan and organise meetings, ensuring the necessary activities are carried out before, during and after the meeting.

### **Specific skills:**

- Communicating
- Managing resources
- Planning
- Checking
- Managing time
- Problem-solving
- Evaluating
- Negotiating
- Interpersonal skills
- Organising

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. How to plan meetings that meet agreed aims and objectives		
B. The different types of meetings and their main features		
C. The purpose and benefits of planning and agreeing a brief for the meeting		
D. The role of the person organising the meeting		
E. How to identify suitable venues for different types of meetings		
F. The types of resources needed for different types of meetings		
G. Health, safety and security requirements when organising meetings		
H. The main points that should be covered by an agenda and meeting papers		
I. The types of information attendees will need		
J. Any special requirements that attendees may have and how to meet them		
K. The benefits of briefing the chair in advance of the meeting		
L. The purpose of welcoming and providing suitable refreshments to attendees		
M. The types of information, advice and support that may be asked to be provided during meetings		
N. The types of problems that may occur during meetings and how to solve these		
O. How to record and follow up actions		
P. How to evaluate external services		
Q. Different ways to collect and evaluate participant feedback from the meeting		
R. How to agree learning points to improve the organisation of future meetings		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Element 1: Before the meeting

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Plan and agree the meeting brief						
2. Agree a budget for the meeting, where appropriate						
3. Organise and confirm venue, equipment and catering requirements						
4. Agree and prepare agenda and meeting papers						
5. Invite attendees, confirm attendance and identify any special requirements						
6. Make sure attendees' needs are met						
7. Collate and dispatch papers for the meeting within agreed timescales						
8. Make sure the chair receives an appropriate briefing						
9. Arrange the equipment and layout of the room						
10. Arrange catering, if appropriate						
11. Make sure someone has been nominated to take minutes, if required						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: At the meeting**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
12. Make sure attendees are welcomed and receive suitable refreshments						
13. Make sure attendees have the papers and other resources they need						
14. Provide information, advice and support when required						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 3: After the meeting**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
15. Evaluate and maintain a record of external services, where these have been used						
16. Collect and evaluate participant feedback from the meeting and share the results with relevant people						
17. Agree learning points and use these to improve the organisation of future meetings						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



**Unit 54:** **Organise business travel or accommodation**

**Unit code:** S321

**Unit credit:** 5

**Unit level:** 6

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**Introduction**

Research, organise and agree arrangements for travel and accommodation to make sure they meet the brief and agreed budget.

**Specific skills:**

- Communicating
- Managing time
- Problem-solving
- Checking
- Negotiating
- Researching
- Decision-making
- Organising
- Evaluating
- Planning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The purpose of confirming the brief and budget for travel or accommodation		
B. How to organise business travel or accommodation to meet expectations		
C. The main types of travel or accommodation arrangements that may need to be made and the procedures to follow		
D. The sources of information and facilities that are used to make travel or accommodation arrangements		
E. How to obtain best value for money when making travel or accommodation arrangements		
F. How to obtain foreign currency, insurance and visas and when these are required		
G. How to keep records of travel or accommodation arrangements, including financial records		
H. The types of information that are confidential and how to store them in line with current legislation		
I. The documents and information to provide to the person who is travelling and how to obtain these		
J. The procedures to follow to make payment arrangements for travel or accommodation		
K. The types of problems that may occur with travel or accommodation arrangements and the correct procedures to follow in order to deal with these problems		
L. The purpose of evaluating the travel or accommodation used and recording the findings of the evaluation for future application		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Organise business travel or accommodation

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Confirm travel or accommodation and budget requirements						
2. Check draft itinerary and schedule with the traveller						
3. Research and book travel arrangements or accommodation as agreed, obtaining best value for money						
4. Obtain foreign currency, relevant insurance and visas, if required						
5. Obtain and collate documents and information for travel or accommodation						
6. Maintain records of travel or accommodation and store any confidential information securely, including financial records						
7. Arrange payment facilities for travel or accommodation						
8. Follow the correct procedures when there are problems with travel or accommodation arrangements						
9. Provide the traveller with an itinerary, documents and information in good time						
10. Confirm with the traveller that itinerary, documents and information meet requirements						
11. Evaluate and maintain a record of external services used						

Additional evidence (if applicable):

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	O = direct observation of the learner's performance by their assessor	PD = professional discussion
Column key:	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



<b>Unit 55:</b>	<b>Make and receive telephone calls</b>
<b>Unit code:</b>	S106
<b>Unit credit:</b>	3
<b>Unit level:</b>	5

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### **Introduction**

Make, receive or transfer telephone calls in line with organisational requirements.

### **Specific skills:**

- Communicating
- Personal presentation
- Questioning
- Summarising

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The different features of telephone systems and how to use them		
B. Organisation structures and communication channels within an organisation		
C. How to follow organisational procedures when making and receiving calls		
D. The purpose of projecting a positive image of self and the organisation		
E. The purpose and value of confidentiality and security when dealing with callers		
F. The types of information that could affect confidentiality and security and how to handle these		
G. The purpose of summarising outcomes of a telephone conversation before ending the call		
H. How to identify problems and who to refer them to		
I. How to report telephone system faults		
<b>Element 1: Make calls</b>		
J. The reasons for identifying the purpose of a call before making it		
K. The different methods that can be used to obtain the names and numbers of people that need to be contacted		
L. How to use telephone systems to make contact with people inside and outside the organisation		
<b>Element 2 :Receive calls</b>		
M. How to identify the caller and their needs		
N. The purpose of giving accurate and up-to-date information to callers		

Knowledge	Type of evidence	Date
<b>Element 3: Transfer calls</b>		
O. The information to be given when transferring calls, taking or leaving messages		
P. How to identify the appropriate person to whom a call is transferred		

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

### Element 1: Make calls

#### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Identify the purpose of the call						
2. Obtain the name and numbers of the person to be contacted						
3. Make contact with the person						
4. Communicate information to achieve the purpose of the call						
5. Summarise the outcomes of the conversation before ending the call						
6. Report telephone system faults to the appropriate colleague						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Element 2: Receive calls

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
7. Answer the telephone according to organisational procedures						
8. Project a positive image of self and the organisation						
9. Identify the caller, where they are calling from and what they need						
10. Provide accurate and up-to-date information to callers while protecting confidentiality and security						
11. Take and pass on messages according to caller's needs						
12. Deal with problems in handling calls, referring to the appropriate person where necessary						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

### Element 3: Transfer calls

#### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
13. Transfer calls promptly, when appropriate						
14. Explain clearly, when a call cannot be transferred, the reason why and agree appropriate action with the caller						
15. When callers are placed on hold, check regularly to see if they wish to continue to hold, in line with organisational procedures						

#### Additional evidence (if applicable):

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
Column key:	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## **Unit 56: Develop a presentation**

**Unit code:** S309

**Unit credit:** 3

**Unit level:** 6

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### **Introduction**

Research, plan and prepare a presentation for specific audiences.

### **Specific skills:**

- Communicating
- Researching
- Evaluating
- Organising
- Planning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The advantages and disadvantages of using presentations to provide information		
B. Different ways of making presentations and their features		
C. The reasons for agreeing the purpose, content, style and timing of presentations before planning and preparation		
D. How to prepare presentations so they are engaging, interesting, concise and informative		
E. How to tailor the presentation to the audience		
F. The different types of equipment that can be used to deliver the presentation		
G. The purpose and value of getting feedback on prepared presentation		
H. How handouts can complement presentations		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Element 1: Develop a presentation

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Agree the purpose, content, style and time of the presentation and who the audience will be						
2. Research and plan the presentation						
3. Choose the equipment required to deliver the presentation						
4. Prepare the presentation to achieve its purpose and suit the needs of the audience						
5. Obtain feedback on the presentation and make necessary adjustments						
6. Estimate how long the presentation will last						
7. Produce presentation handouts, when required						
8. Reflect on feedback obtained of the presentation and identify learning points						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



## **Unit 57: Deliver a presentation**

**Unit code:** S310

**Unit credit:** 3

**Unit level:** 6

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### **Introduction**

Prepare for, deliver and evaluate a formal presentation.

### **Specific skills:**

- Communicating
- Planning
- Evaluating
- Managing time
- Organising

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Different ways of delivering presentations and their features		
B. How to tailor the presentation to the audience		
C. The purpose and benefits of rehearsing presentations and how to do so		
D. How handouts can complement presentations		
E. The types of equipment used for presentations and their features		
F. The purpose and value of checking equipment in advance		
G. How to use equipment to make presentations		
H. The purpose and benefits of contingency planning		
I. The types of problems that may occur with presentation equipment and how to deal with these		
J. The purpose and benefits of speaking clearly to convey the main points of a presentation		
K. How to gauge audience reaction to the presentation		
L. The purpose and benefits of summarising important features of the presentation		
M. The purpose and benefits of giving opportunities to the audience to ask questions		
N. The purpose and benefits of collecting feedback from the audience on the presentation		
O. The purpose and benefits of evaluating the presentation and reflecting on the performance		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Deliver a presentation</b>
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**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Choose equipment and plan how to use the equipment's features to best effect						
2. Develop contingency plans in case of equipment failure or other problems						
3. Practise and time the delivery of the presentation						
4. Obtain feedback on the presentation and make necessary adjustments						
5. Make sure the equipment and resources are in working order						
6. Make sure the audience receive presentation materials						
7. Introduce self to the audience and state the aims of the presentation						
8. Address the audience by speaking clearly and confidently, using language which is appropriate to the topic and the audience						
9. Use equipment, where appropriate, to enhance the presentation and deal with any problems that may occur						
10. Vary your voice tone, pace and volume to emphasise key points and maintain the audience's interest						

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
11. Use your body language in a way that reinforces your message						
12. Gauge audience reaction during the presentation and adapt accordingly						
13. Summarise the key points						
14. Provide the audience with the opportunity to ask questions						
15. Listen carefully to questions and respond in a way that meets the audience's needs						
16. Collect feedback on the presentation						
17. Reflect on own performance and identify learning points						
18. Evaluate the presentation and identify changes that will improve future presentations						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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**Unit 58:** **Deliver, monitor and evaluate customer service to internal customers**

**Unit code:** S325

**Unit credit:** 3

**Unit level:** 6

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**Introduction**

Deliver, monitor, evaluate and improve services to meet internal customer needs.

**Specific skills:**

- Evaluating
- Listening
- Monitoring
- Negotiating
- Problem-solving
- Questioning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The types of products and services offered by your organisation relevant to internal customers		
B. What is meant by internal customer service		
C. The purpose and benefits of delivering internal customer service that meets or exceeds internal and customer expectations		
D. How to build positive working relationships with internal customers		
E. How to manage internal customer expectations		
F. The purpose and benefits of identifying and confirming internal customer needs		
G. The types of quality standards appropriate to own responsibilities		
H. How to set and meet timescales and quality standards with internal customers		
I. The purpose and benefits of monitoring internal customer satisfaction and how to do so		
J. The types of problems that internal customers may experience and how to process and resolve or refer them		
K. The correct procedures to follow when handling complaints		
L. The techniques for collecting and analysing internal customer feedback		
M. The purpose and benefits of continuous improvement		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
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Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Identify customer needs and expectations**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Build positive working relationships with internal customers						
2. Manage expectations of internal customers to make sure they are realistic						
3. Identify and confirm internal customer needs						
4. Agree timescales and quality standards with internal customers						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

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Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: Deliver customer services**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
5. Provide services to agreed timescales and quality standards and follow procedures if these are not achieved						
6. Check internal customer needs and expectations are met						
7. Follow the correct procedures to handle complaints in a professional manner and to a given timescale						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

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I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 3: Monitor and evaluate customer services**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
8. Obtain and record internal customer feedback						
9. Analyse and evaluate internal customer feedback						
10. Take action to improve service to internal customers						

Additional evidence (if applicable):

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



**Unit 59:** **Deliver, monitor and evaluate customer service to external customers**

**Unit code:** S326

**Unit credit:** 3

**Unit level:** 6

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**Introduction**

Deliver, monitor, evaluate and improve services to meet external customer needs.

**Specific skills:**

- Evaluating
- Listening
- Monitoring
- Negotiating
- Problem-solving
- Questioning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The types of products and services offered by your organisation relevant to external customers		
B. What is meant by external customer service		
C. The purpose and benefits of delivering external customer service that meets or exceeds external and customer expectations		
D. How to build positive working relationships with external customers		
E. How to manage external customer expectations		
F. The purpose and benefits of identifying and confirming external customer needs		
G. The types of quality standards appropriate to own responsibilities		
H. How to set and meet timescales and quality standards with external customers		
I. The purpose and benefits of monitoring external customer satisfaction and how to do so		
J. The types of problems that external customers may experience and how to process and resolve or refer them		
K. The correct procedures to follow when handling complaints		
L. The techniques for collecting and analysing external customer feedback		
M. The purpose and benefits of continuous improvement		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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**Element 1: Identify customer needs and expectations**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Build positive working relationships with external customers						
2. Manage expectations of external customers to make sure they are realistic						
3. Identify and confirm external customer needs						
4. Agree timescales and quality standards with external customers						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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## Element 2: Deliver customer services

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
5. Provide services to agreed timescales and quality standards and follow procedures if these are not achieved						
6. Check external customer needs and expectations are met						
7. Follow the correct procedures to handle complaints in a professional manner and to a given timescale						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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**Element 3: Monitor and evaluate customer services**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
8. Obtain and record external customer feedback						
9. Analyse and evaluate external customer feedback						
10. Take action to improve service to external customers						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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**Unit 60:** **Support the design and development of information systems**

**Unit code:** S315

**Unit credit:** 7

**Unit level:** 6

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**Introduction**

Contribute to the design and support the development of information systems to meet users' needs.

**Specific skills:**

- Analysing
- Organising
- Using technology
- Evaluating
- Planning
- Managing resources
- Problem solving
- Negotiating
- Researching

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The purpose and benefits of managing information to meet specifications		
B. The types of information that need to be managed in a business		
C. The types of information systems available and their main features		
D. The purpose and benefits of identifying and agreeing user needs for an information system and developing specifications based on these		
E. How to develop specifications for information management, including resources and budgets		
F. How to create and develop an information system based on identified user needs		
G. The purpose and benefits of testing information systems		
H. How to test an information system		
I. How to resolve faults, within the limits of own authority		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## Support the design and development of information systems

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Identify the information that will be managed within the system						
2. Identify the resources required and available to deliver and implement the system						
3. Contribute to the design of a system specification that meets identified needs and budgetary controls						
4. Support the development of an information system that meets the specification						
5. Support testing of the information system against the agreed specification						
6. Resolve faults, within the limits of own authority						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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## **Unit 61: Monitor information systems**

**Unit code:** S316

**Unit credit:** 7

**Unit level:** 6

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### **Introduction**

Maintain and monitor information systems to meet agreed specifications within legislation and organisational requirements.

### **Specific skills:**

- Analysing
- Monitoring resources
- Problem-solving
- Developing others
- Negotiating
- Researching
- Evaluating
- Organising
- Using technology
- Monitoring
- Planning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The purpose and benefits of managing information to meet specifications		
B. The purpose and benefits of monitoring the use of an information system		
C. The different ways of monitoring use if an information system		
D. The benefits of training users of the information system with available methods		
E. The purpose of maintaining and updating the information system and methods you can use		
F. The types of problems that occur with information systems and how to deal with them		
G. The different ways of maintaining and updating an information system		
H. The benefits of continuously improving information systems		
I. Legislation and organisational requirements covering data protection and freedom of information		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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<b>Monitor information systems</b>
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**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Identify the information to be monitored and the resources available to do so						
2. Provide training and ongoing support to users						
3. Maintain and update the information system						
4. Monitor the use of the information system						
5. Resolve problems when they occur						
6. Review and further develop information systems to meet agreed specifications						
7. Make sure all relevant legal and organisational requirements are followed						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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**Unit 62:** **Analyse and report data**

**Unit code:** S317

**Unit credit:** 6

**Unit level:** 6

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**Introduction**

Select, organise, analyse and report data.

**Specific skills:**

- Analysing
- Planning
- Using technology
- Communicating
- Presenting information
- Decision-making
- Problem-solving
- Organising
- Researching

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The purpose and value of agreeing aims, objectives and deadlines		
B. The differences between primary and secondary research methods		
C. The differences between quantitative and qualitative research methods		
D. Relevant data sources and search methods		
E. How to evaluate the relevance and reliability of the sources of data		
F. What constitutes relevant, valid and reliable data		
G. How to organise data for analysis		
H. Analysis and evaluation techniques which produce accurate and unbiased results		
I. The different formats that may be required when reporting data		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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<b>Analyse and report data</b>
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### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Select relevant, valid and reliable data for analysis						
2. Organise data for analysis						
3. Apply analysis and evaluation techniques appropriate to the purpose of the research						
4. Produce accurate, unbiased results and conclusions						
5. Check the accuracy of the analysis using appropriate techniques and make adjustments where necessary						
6. Get feedback on what you have found, if necessary						
7. Present data on time and in the agreed format						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
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## **Unit 63: Provide administrative support in schools**

**Unit code:** S329

**Unit credit:** 8

**Unit level:** 6

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### **Introduction**

Work with school contacts and wider community contacts to contribute to school goals and priorities

School contacts include pupils and students; parents; guardians; carers; colleagues; and governing bodies. Wider community contacts include community organisations; relevant authorities; children's services; welfare services; local businesses; the police; and regulatory bodies.

### **Specific skills:**

- Analysing
- Managing conflict
- Organising
- Researching
- Communicating
- Managing time
- Planning
- Team working
- Evaluating
- Negotiating
- Prioritising
- Using technology
- Literacy
- Numeracy
- Problem solving
- Writing

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Why it is important to build positive working relationships with contacts		
B. How to build positive working relationships with contacts		
C. Why it is important for your school to have a friendly and efficient way of dealing with contacts		
D. The types of contacts you deal with, the requirements that they have and how to meet their needs		
E. Why it is important to present a positive image of yourself and your school		
F. Types of problems that may occur with contacts - including conflict and aggression - and the procedures for dealing with these		
G. The social context in which your school operates, including the cultural diversity of the community and how it impacts on the school environment		
H. How your role contributes to your school's goals and improvement or development priorities		
I. How your role supports teaching and learning		
J. Your school's policy and administrative procedures for dealing with parents, guardians and carers, and your roles and responsibilities in relation to these		
K. Your school's policy and administrative procedures for dealing with pupils and students, and your roles and responsibilities in relation to these		
L. Your school's policy and administrative procedures for dealing with the wider community, and your roles and responsibilities in relation to these		
M. How to comply with policies and procedures relating to child protection and student welfare; and how to report concerns to an appropriate person		
N. The policy context, wider issues and initiatives that affect the work of the school, (e.g. relevant authority policies; government standards, legislation and regulations; government initiatives; etc)		
<b>For the whole unit</b>		

Knowledge	Type of evidence	Date
O. The types of administrative and organisational support that you may be required to provide to school contacts and the wider community		
P. The purpose of school administration systems and procedures and why they are important		
Q. Your school's administrative and organisational systems and procedures in relation to your role		
R. Methods of analysing and evaluating information		
S. Your school's procedures for producing reports		
T. How to identify confidential information in line with your school's procedures and relevant data protection legislation		
U. Why confidential information should be safeguarded and how to do this		
V. The limits of your authority in relation to confidential information		
W. When to refer confidential information to the relative authority or appropriate person and who to refer it to (e.g. where concerns for a child's safety override confidentiality)		
X. The limits of your authority and why it important to act within them		
Y. When to refer issues to a higher authority and who to refer them to		

**Additional evidence (if applicable):**

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	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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**Element 1: Work with school contacts and wider community contacts**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Build positive working relationships						
2. Present a positive image of yourself and your school						
3. Communicate effectively with contacts						
4. Follow school policies and procedures for dealing with parents, guardians and carers						
5. Follow school policies and procedures for dealing with pupils and students						
6. Follow school policies and procedures for dealing with colleagues and the wider community						
7. Provide effective administrative and organisational support to school contacts and the wider community						
8. Operate school administration systems						
9. Analyse and evaluate information						
10. Produce reports in line with school procedures						
11. Safeguard confidential information						
12. Act within the limits of your authority						
13. Refer issues beyond your authority to the appropriate person						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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## **Unit 64: Administer parking and traffic challenges, representations and civil parking appeals**

**Unit code:** S330

**Unit credit:** 9

**Unit level:** 6

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### **Introduction**

Provide administrative services for parking challenges, representations and civil parking notice (CPN) appeals. Civil parking notice means any parking or traffic notice issued in relation to any contravention or infringement of contract under current legislation. There is no statutory appeals process for parking on private land, therefore the civil penalty notice appeal process has been included in this standard.

### **Specific skills:**

- Analysing
- Interpersonal skills
- Presenting yourself
- Communicating
- Managing time
- Problem solving
- Decision-making
- Negotiating
- Researching
- Evaluating
- Organising
- Using technology

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The services that you are responsible for and the limits and scope of your responsibilities and authority in providing these services		
B. Your organisation's policies, procedures and constraints that affect services in your area of responsibility and how to apply them		
C. The current legislation, codes of practice and Traffic Regulation Orders that apply when you are dealing with challenges, representations and CPN appeals		
D. The requirements of the Data Protection Act and its implications for your role		
E. The specialist software used by your organisation for the recording and processing of challenges, representations and CPN appeals and how to use it		
F. How to access and use the sources of information that you need to deal with challenges, representations and CPN appeals		
G. How to interpret the documents that are used in parking control administration in relation to dealing with challenges, representations and CPN appeals		
H. How to communicate effectively with customers so that you can be clear about the nature of their enquiry and can explain to customers the courses of action available to them		
I. The information that is needed to consider a challenge, representation or CPN appeal, and why this is the case		
J. Recognised criteria for cancellation		
K. Why it is important to record receipt of a challenge, representation or CPN appeal		
L. How to identify evidence that is reliable, valid and sufficient		
M. What information and evidence has to be provided by the customer and how to check that it is valid		
N. The range of internal evidence that is needed to support a reliable decision, and where to obtain it		

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
O. How to clarify the details of the customer's challenge, representation or CPN appeal through oral or written questioning		
P. The limits of your responsibility in investigating challenges, representations and CPN appeals and who to refer matters outside of your authority to		
Q. How to identify and obtain evidence that you have not been provided with		
R. How to make decisions that are supported by the evidence and comply with current legal and organisational requirements		
S. The courses of action that a customer can take once a decision has been made, and the consequences of taking those courses of action		

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

### Element 1: Register receipt of challenges, representations and CPN appeals

#### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Respond promptly to a customer's initial enquiry with accurate advice						
2. Record that you have received the written challenge, representation or CPN appeal						
3. Make sure you have the information you need to understand the customer's case						
4. Check the details of the documentation you have received for accuracy, consistency and validity						
5. If the documentation fails to meet the requirements for considering the challenge, representation or CPN appeal promptly inform the customer of this and the courses of action they can take						
6. If the customer's situation does not fall within recognised criteria for cancellation inform the customer of this and the courses of action they can take						
7. At all stages, comply with organisational and legal requirements						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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## Element 2: Respond to challenges, representations and CPN appeals

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
8. Collate evidence for response to the challenge, representation or CPN appeal						
9. If necessary, take prompt action to suspend the enforcement process while the case is being investigated						
10. Make sure all internal records are accurate, reliable, valid and up-to-date						
11. Review the documentation to make sure there is sufficient evidence, and decide whether you need additional evidence						
12. Where necessary, obtain the additional items of evidence needed						
13. Refer any matter which is beyond the limits of your responsibility to the appropriate person						
14. Review all evidence and make a decision						
15. Inform the customer, in writing and within agreed timescales, of your decision and the courses of action that they can take						
16. Where appropriate, reactivate the enforcement process						
17. Keep copies of all correspondence and update records						
18. At all stages, comply with current organisational and legal requirements						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## **Unit 65: Administer statutory parking and traffic appeals**

**Unit code:** S331

**Unit credit:** 9

**Unit level:** 7

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### **Introduction**

Process documentation and respond to statutory appeals against parking penalty charge notices (PCN) including those following a successfully filed statement of truth on grounds 1, 2, 3 or 4. This standard covers the statutory appeals process. Civil parking notice (CPN) appeals for which there is no statutory process are covered in standard 329 Administer challenges, representations and CPN appeals. Civil parking notice means any parking or traffic notice issued in relation to any contravention or infringement of contract under current legislation.

### **Specific skills:**

- Accuracy
- Evaluating
- Presenting yourself
- Researching
- Analysing
- Letter writing
- Problem solving
- Using technology
- Communicating
- Managing time
- Quality checking
- Decision-making
- Organising
- Recording

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The services that you are responsible for and the limits and scope of your responsibilities and authority in providing these services		
B. The services for which you are responsible		
C. Your organisation's policies, procedures and constraints that affect services in your area of responsibility		
D. The rules that apply when you are dealing with statutory appeals (e.g. Codes of Conduct, Code of Practice)		
E. How to interpret Traffic Regulation Orders		
F. The current legislation that applies when you are dealing with statutory appeals (e.g. Traffic Management Act 2004)		
G. The requirements of the Data Protection Act and its implications for your role		
H. The specialist software used by your organisation for the recording and processing of statutory appeals		
I. How to identify evidence that is sufficient, reliable and valid		
J. What information has to be provided and how to check that it is accurate		
K. The grounds on which someone may appeal		
L. The grounds on which someone may file a statement of truth		
M. The importance of acting within the given deadline for the case and the consequences of failing to do so		
N. The limits of your responsibility in investigating statutory appeals and to whom matters outside your authority should be referred		

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
O. What evidence is needed and why		
P. How to identify and obtain evidence that you have not been provided with		
Q. Who to consult if further information is needed		
R. How to prepare a case summary		
S. How to present a case summary and why it is important to present it in this way		
T. How to prepare the documentation for a case that is not to be contested		
U. Your organisation's requirements for the presentation and organisation of documents for a statutory appeal hearing		
V. How to prepare yourself for a hearing, if you have to attend one yourself		
W. The Code of Conduct which regulates how to behave if you attend statutory appeal hearings yourself		
X. The kinds of further information that might be requested		
Y. What actions to take to close a case		
Z. How to arrange for refunds of fees to be paid		
AA. The records (paper and electronic) that need to be updated to record the outcome of the statutory appeal and how to do this		
BB. Who to inform of the outcomes of a statutory appeal and why		
CC. The courses of action that are available to the appellant		
DD. The courses of action that are available to the respondent		
EE. What actions to take to reactivate the recovery process		

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

### Element 1: Prepare case evidence

#### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Record that you have received the statutory appeal notification or revocation order						
2. Take action to suspend the enforcement process during the investigation						
3. Check the details of the documentation you have received for accuracy and consistency and notify the appropriate person of any discrepancies						
4. Make sure that you understand the grounds on which the customer is appealing or the statement of truth has been filed						
5. At all stages comply with current organisational and legal requirements						
6. At all stages carry out work within the given deadline for the case						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
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**Element 2: Investigate the case for statutory appeal and decide how to proceed**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
7. Make sure all necessary evidence is present, accurate, valid and reliable						
8. Identify and obtain any additional items of evidence that are needed						
9. Where necessary consult other people to obtain further information						
10. Refer any matter which is beyond the limits of your responsibility to the appropriate person						
11. Review all evidence; make and record a decision on the basis of the evidence						
12. Where the decision is not to contest the statutory appeal or the statement of truth, make sure that the adjudicator and appellant or respondent are informed and that the decision has been recorded properly						
13. At all stages comply with current organisational and legal requirements						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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### Element 3: Contest the statutory appeal

#### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
14. Prepare a case summary in accordance with organisational guidelines and relevant codes of practice						
15. Collate, label and present documentation in the format required by the appeals service						
16. Make sure copies of documentation are provided to all relevant people						
17. Make sure that you are prepared to respond to requests for further information including when a statutory appeal is referred by an adjudicator to an independent person to consider mitigation						
18. If you attend the hearing, ensure that you are fully conversant with the case and that you comply with the Code of Conduct for personal attendance						

**Additional evidence (if applicable):**

--

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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**Element 4: Respond appropriately to the outcomes of the statutory appeal**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Practical	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
19. On receiving notification of the outcome of the statutory appeal, update all records in accordance with organisational and legal requirements						
20. Proceed with the case as appropriate to the outcomes of the statutory appeal						
21. Review and consider the adjudicator's feedback; take appropriate actions						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
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**Unit 66:** Administer parking and traffic debt recovery

**Unit code:** S332

**Unit credit:** 6

**Unit level:** 7

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**Introduction**

Provide administrative services for the recovery of parking and traffic debt.

**Specific skills:**

- Accuracy
- Evaluating
- Presenting yourself
- Researching
- Analysing Managing time
- Problem solving
- Using technology
- Communicating
- Monitoring
- Quality checking
- Decision-making
- Organising
- Recording

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. The services that you are responsible for and the limits and scope of your responsibilities and authority in providing these services		
B. Your organisation's policies, procedures and constraints that affect services in your area of responsibility and how to apply them		
C. The current legislation and regulations that apply		
D. The requirements of the Data Protection Act and its implications for your role		
E. The criteria, policy and procedures in relation to debt recovery (e.g. for non-collection, write off, case closure, tracing and recovery, maximising debt collection, reporting, performance management)		
F. Understanding of the debt recovery process within your organisation		
G. The role of Traffic Enforcement Centre and/or the magistrates court in the debt recovery process		
H. The debt recovery documentation to be served and how to do this		
I. The case evidence that may be used		
J. How to investigate a case, the limits of your responsibility and to whom matters outside your authority should be referred		
K. The range of possible outcomes of a case and the appropriate actions to take for each outcome		
L. The role of debt recovery agents and other agencies		
M. How to communicate effectively with debt recovery agents and other outside agencies		
N. The importance of the audit trail and how to update and maintain records as necessary		
O. The reports that are required and how and when to produce them		
P. How to close a case in line with your organisational policy and relevant legislation		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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## Element 1: Administer parking and traffic debt recovery

### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Monitor the quality of the data to be registered at Traffic Enforcement Centre (TEC) or magistrates court						
2. Ensure debt recovery documentation is served in accordance with organisational policy and relevant legislation						
3. Investigate the case and prepare case evidence in accordance with organisational policy and relevant legislation						
4. Review all evidence; make and record a decision on the basis of the evidence						
5. Where the decision is not to pursue the case make sure that relevant people are informed and that the decision has been recorded properly						
6. Where the decision is to pursue the case, proceed in accordance with organisational policy and relevant legislation						
7. Respond appropriately to the outcomes of the case, review feedback and take appropriate action						
8. Liaise with debt recovery agents						
9. Liaise with outside agencies						
10. Monitor the performance of debt recovery agents						

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
11. Produce relevant reports; update and maintain records in line with organisational policy and relevant legislation						
12. At all stages carry out work within the given deadlines for the case						
13. Close the case in accordance with organisational policy and relevant legislation						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
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<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
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**Unit 67:** **Use occupational and safety guidelines when using keyboards**

**Unit code:** S112

**Unit credit:** 2

**Unit level:** 4

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**Introduction**

Position the relevant parts of the body safely when typing at a workstation.

**Specific skills:**

- Communicating
- Planning
- Problem solving

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Concepts of ergonomic practice relating to typing in accordance with occupational health and safety guidelines		
B. Organisational occupational health and safety guidelines		
C. How to position fingers, wrists, forearms and back in relation to the size, slope and type of keyboard		
D. How to position fingers, wrists, forearms and back in relation to the size and shape of the workstation being used		
E. Workstation care and maintenance in relation to typing operations		

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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**Use occupational and safety guidelines when using keyboards**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Follow the concepts of ergonomic practice related to typing						
2. Follow relevant occupational health and safety guidelines						
3. Position relevant parts of the body in relation to the size, slope and type of keyboard being used						
4. Position relevant parts of the body in relation to the size and shape of the workstation being used						
5. Maintain and care for the workstation being used for typing operations						

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
<b>Column key:</b>	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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## **Unit 68: Bespoke Software 1**

**Unit code:** S114 a

**Unit credit:** 2

**Unit level:** 4

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### **Introduction**

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. This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Checking
- Communicating
- Presenting information
- Using technology

**Element 1: Input, organise and combine information using bespoke or specialist software**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Input relevant information accurately into existing templates and/or files so that it is ready for processing						
2. Organise and combine information of different forms or from different sources						
3. Follow local and/or legal guidelines for the storage and use of data where available						
4. Respond appropriately to data entry error messages						

**Additional evidence (if applicable):**

<p><b>Column key:</b></p>	<p><b>O = direct observation of the learner's performance by their assessor</b></p> <p><b>Q&amp;A = outcomes from oral or written questioning</b></p> <p><b>P = products of the learner's work</b></p> <p><b>RA = personal statements and/or reflective accounts</b></p> <p><b>S = outcome from simulation, where permitted by the assessment strategy</b></p>	<p><b>PD = professional discussion</b></p> <p><b>A = assignment, project/case studies</b></p> <p><b>WT = authentic statements/witness testimony</b></p> <p><b>EPW = expert witness testimony</b></p> <p><b>RPL = evidence of recognition of prior learning</b></p>
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I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: Use tools and techniques to edit, process, format and present information**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
5. Use appropriate tools and techniques to edit, process or format information						
6. Check information meets needs, using IT tools and making corrections as necessary						
7. Use appropriate presentation methods and accepted layouts						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## **Unit 69: Specialist Software 1**

**Unit code:** S114 b

**Unit credit:** 2

**Unit level:** 4

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### **Introduction**

Use basic specialist software tools and techniques appropriately for straightforward or routine information. Any aspect that is unfamiliar will require support and advice from others. This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Checking
- Communicating
- Presenting information
- Using technology

**Element 1: Input, organise and combine information using bespoke or specialist software**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Input relevant information accurately into existing templates and/or files so that it is ready for processing						
2. Organise and combine information of different forms or from different sources						
3. Follow local and/or legal guidelines for the storage and use of data where available						
4. Respond appropriately to data entry error messages						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: Use tools and techniques to edit, process, format and present information**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
5. Use appropriate tools and techniques to edit, process or format information						
6. Check information meets needs, using IT tools and making corrections as necessary						
7. Use appropriate presentation methods and accepted layouts						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## **Unit 70: Data management software 1**

**Unit code:** S115

**Unit credit:** 2

**Unit level:** 4

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### **Introduction**

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.

This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Analysing
- Presenting information
- Checking
- Using technology
- Organising
- Planning

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Identify the security procedures used to protect data		
B. Identify which report to run to output the required information		

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning
<b>Column key:</b>		

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Enter, edit and maintain data records in a data management system**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Enter data accurately into records to meet requirements						
2. Locate and amend individual data records						
3. Check data records meet needs, using IT tools and making corrections as necessary						
4. Respond appropriately to data entry error messages						
5. Follow local and/or legal guidelines for the storage and use of data where available						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: Retrieve and display data records to meet requirements**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
6. Search for and retrieve information using predefined methods to meet given requirements						
7. Select and view specified reports to output information to meet given requirements						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Unit 71:</b>	<b>Database software 1</b>
<b>Unit code:</b>	S116
<b>Unit credit:</b>	3
<b>Unit level:</b>	4

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## **Introduction**

Use basic 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.

This standard is imported from the e-skills IT Users suite.

## **Specific skills:**

- Analysing
- Presenting information
- Checking
- Using technology
- Organising
- Planning



	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Enter, edit and organise structured information in a database**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Create a database table for a purpose using specified fields						
2. Enter structured data into records to meet requirements						
3. Locate and amend data records						
4. Respond appropriately to data entry error messages						
5. Check data meets needs, using IT tools and making corrections as necessary						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: Use database software tools to extract information and produce reports**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
6. Run simple database queries						
7. Generate and print predefined database reports						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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Assessor signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Unit 72:</b>	<b>Improving productivity using IT 1</b>
<b>Unit code:</b>	S117
<b>Unit credit:</b>	3
<b>Unit level:</b>	4

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### **Introduction**

Plan and review their use of predefined or commonly used IT tools for activities that are straightforward or routine. As a result of reviewing their work, an individual will be able to identify and use automated methods or alternative ways of working to improve productivity. Any aspect that is unfamiliar will require support and advice from other people. This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Checking
- Negotiating
- Using technology
- Evaluating
- Organising
- Managing resources
- Planning
- Monitoring
- Problem solving

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Identify the purpose for using IT		
B. Identify the methods, skills and resources required to complete the task successfully		
C. Identify reasons for choosing particular IT systems and software applications for the task		
D. Identify any legal or local guidelines or constraints that may affect the task or activity		
E. Identify automated routines to improve productivity		
F. Decide whether the IT tools selected were appropriate for the task and purpose		
G. Identify the strengths and weaknesses of the completed task		
H. Identify ways to make further improvements to work		

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Plan the use of appropriate IT systems and software to meet requirements**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Plan how to carry out the task using IT to achieve the required purpose and outcome						
2. Select IT systems and software applications as appropriate for the purpose						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: Use IT systems and software efficiently to complete planned tasks**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
3. Use automated routines that aid efficient processing or presentation						
4. Complete planned tasks using IT						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 3: Review the selection and use of IT tools to make sure that tasks are successful**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
5. Review outcomes to make sure they meet the requirements of the task and are fit for purpose						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_



## **Unit 73: IT security for users 1**

**Unit code:** S118

**Unit credit:** 1

**Unit level:** 4

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### **Introduction**

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). This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Checking
- Negotiating
- Using technology
- Evaluating
- Organising
- Managing resources
- Planning
- Monitoring
- Problem solving

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Identify security issues that may threaten system performance		
B. Identify threats to information security associated with the widespread use of technology		
C. Describe why it is important to backup data securely		

### Additional evidence (if applicable):

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Use appropriate methods to minimise security risks to IT systems and data**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Take appropriate security precautions to protect IT systems and data						
2. Take appropriate precautions to keep information secure						
3. Follow relevant guidelines and procedures for the secure use of IT						
4. Ensure personal data is backed up to appropriate media						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate's sampled work meets the standards specified for this Unit and may be presented for external verification.

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

<b>Unit 74:</b>	<b>Presentation software 1</b>
<b>Unit code:</b>	S119
<b>Unit credit:</b>	3
<b>Unit level:</b>	4

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## **Introduction**

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. This standard is imported from the e-skills IT Users suite.

## **Specific skills:**

- Communicating
- Planning
- Evaluating
- Presenting information
- Managing time
- Using technology
- Organising

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Identify what types of information are required for the presentation		
B. Identify any constraints which may affect the presentation		
C. Identify what slide structure to use		
D. Identify how to present slides to meet needs and communicate effectively		

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Input and combine text and other information within presentation slides**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Select and use different slide layouts as appropriate for different types of information						
2. Enter information into presentation slides so that it is ready for editing and formatting						
3. Combine information of different forms or from different sources for presentations						
4. Store and retrieve presentation files effectively, in line with local guidelines and conventions where available						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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**Element 2: Use presentation software tools to structure, edit and format slides**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
5. Select and use an appropriate template to structure slides						
6. Select and use appropriate techniques to edit slides						
7. Select and use appropriate techniques to format slides						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
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**Element 3: Prepare slides for presentation to meet needs**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

<b>Performance</b>	<b>Type of evidence</b>	<b>Portfolio Reference</b>	<b>Date</b>	<b>Type of evidence</b>	<b>Portfolio Reference</b>	<b>Date</b>
To meet the national standard you must:						
8. Prepare slides for presentation						
9. Check presentation meets needs, using IT tools and making corrections as necessary						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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## **Unit 75: Set up an IT System 1**

**Unit code:** S120

**Unit credit:** 3

**Unit level:** 4

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### **Introduction**

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. This standard is imported from the e-skills IT Users suite.

### **Specific skills:**

- Checking
- Negotiating
- Using technology
- Evaluating
- Organising
- Managing resources
- Planning
- Monitoring
- Problem solving

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Identify what IT system components, storage and peripheral devices are needed and how to connect them		
B. Identify any health and safety issues associated with setting up an IT system		
C. Identify the details needed to connect to an Internet Service Provider (ISP)		
D. Identify what security precautions need to be addressed when connecting to the internet		
E. Identify simple tests that can be used to check the system		
F. Identify simple communication tests that can be used to check the internet connection		
G. Identify how to report faults and seek expert help		

### Additional evidence (if applicable):

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

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**Element 1: Connect up a personal computer, printer and peripheral devices safely**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Connect up the components of an IT system safely, including a printer and other peripheral devices						
2. Connect removable storage media to a PC safely						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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**Element 2: Connect to an IT communication service**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
3. Connect communication hardware safely to a PC						
4. Connect to a communication service from a PC						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
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**Element 3: Set up software for use.**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
5. Configure the user interface to meet needs						
6. Set up and configure virus protection software						
7. Set up files and software to meet needs						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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**Element 4: Check that the IT system and communication service are working successfully**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
8. Run tests to check that the system and communication service are working successfully						
9. Respond to error messages and report faults as appropriate						

**Additional evidence (if applicable):**

	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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## **Unit 76: Spreadsheet Software 1**

**Unit code:** S121

**Unit credit:** 3

**Unit level:** 4

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### **Introduction**

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. This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Checking
- Communicating
- Presenting information
- Using technology



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	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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**Element 1: Use a spreadsheet to enter, edit and organise numerical and other data**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Enter and edit numerical and other data accurately						
2. Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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**Element 2: Use appropriate formulas and tools to summarise and display spreadsheet information**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
3. Use functions and formulas to meet calculation requirements						
4. Use spreadsheet tools and techniques to summarise and display information						

**Additional evidence (if applicable):**

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	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
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**Element 3: Select and use appropriate tools and techniques to present spreadsheet information effectively**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
5. Select and use appropriate tools and techniques to format spreadsheet cells, rows and columns						
6. Select and use appropriate tools and techniques to generate, develop and format charts and graphs						
7. Select and use appropriate page layout to present and print spreadsheet information						
8. Check information meets needs, using spreadsheet tools and making corrections as necessary						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
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<b>Unit 77:</b>	<b>Using collaborative technologies 1</b>
<b>Unit code:</b>	S122
<b>Unit credit:</b>	3
<b>Unit level:</b>	4

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### **Introduction**

Safely use IT tool 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.

Any aspect that is unfamiliar will require support and advice from others.  
This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Communicating
- Presenting information
- Using technology

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Identify risks in using collaborative technology and why it is important to avoid them		
B. Identify when and how to report online safety and security issues		
C. Identify what methods are used to promote trust		
D. Identify the purpose for using collaborative technologies and expected outcomes		
E. Identify which collaborative technology tools and devices to use for different communication media		
F. Identify what terms and conditions apply to using collaborative technologies		
G. Identify what and why permissions are set to allow others to access information		
H. Identify when there is a problem with collaborative technologies and where to get help		

**Additional evidence (if applicable):**

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	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
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**Element 1: Stay safe and secure when using collaborative technology**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Follow guidelines for working with collaborative technology						
2. Carry out straightforward checks on others' online identities and different types of information						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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**Element 2: Set up and access IT tools and devices for collaborative working**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:									
3. Set up IT tools and devices that will enable you to contribute to collaborative work									

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
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**Element 3: Prepare collaborative technologies for use**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
4. Use given details to access collaborative technologies needed for a collaborative task						
5. Adjust basic settings on collaborative technologies						
6. Change the environment of collaborative technologies						
7. Set up and use a data reader to feed information						

**Additional evidence (if applicable):**

	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
<b>Column key:</b>	<b>P = products of the learner's work</b>	<b>WT = authentic statements/witness testimony</b>
	<b>RA = personal statements and/or reflective accounts</b>	<b>EPW = expert witness testimony</b>
	<b>S = outcome from simulation, where permitted by the assessment strategy</b>	<b>RPL = evidence of recognition of prior learning</b>

I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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**Element 4: Contribute to tasks using collaborative technologies**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
8. Contribute responsibly and actively to collaborative working						
9. Contribute to producing and archiving the agreed outcome of collaborative working						
10. Respond to simple problems with collaborative technologies						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
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	P = products of the learner's work	WT = authentic statements/witness testimony
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I confirm that the evidence detailed in this Unit is my own work and meets the requirements of the National Occupational standards.

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

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

## **Unit 78: Website Software 1**

**Unit code:** S123

**Unit credit:** 3

**Unit level:** 4

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### **Introduction**

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. This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Communicating
- Planning
- Evaluating
- Presenting information
- Managing time
- Using technology
- Organising

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>For the whole unit</b>		
A. Identify what content and layout will be needed in the web page		
B. Identify the purpose of the webpage and intended audience		
C. Identify copyright and other constraints on using others' information		
D. Identify what file types to use for saving content		
E. Identify what editing and formatting to use to aid both clarity and navigation		

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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**Element 1: Plan and create web pages**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Select and use a website design template to create a single web page						
2. Enter or insert content for web pages so that it is ready for editing and formatting						
3. Organise and combine information needed for web pages						
4. Store and retrieve web files effectively, in line with local guidelines and conventions where available						

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**Element 2: Use website software tools to structure and format web pages**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
5. Select and use website features to help the user navigate simple websites						
6. Use appropriate editing and formatting techniques						
7. Check web pages meet needs, using IT tools and making corrections as necessary						

**Additional evidence (if applicable):**

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**Element 3: Publish web pages to the Internet or an intranet**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
8. Upload content to a website						
9. Respond appropriately to common problems when testing a web page						

**Additional evidence (if applicable):**

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## **Unit 79: Word Processing Software 1**

**Unit code:** S124

**Unit credit:** 3

**Unit level:** 4

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### **Introduction**

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. This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Checking
- Communicating
- Presenting information
- Using technology



	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 1: Enter, edit and combine text and other information accurately within word processing documents**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Use keyboard or other input method to enter or insert text and other information						
2. Combine information of different types or from different sources into a document						
3. Enter information into existing tables, forms and templates						
4. Use editing tools to amend document content						
5. Store and retrieve document files effectively, in line with local guidelines and conventions where available						

**Additional evidence (if applicable):**

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	O = direct observation of the learner's performance by their assessor	PD = professional discussion
<b>Column key:</b>	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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

Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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

Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 2: Structure information within word processing documents**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
6. Create and modify tables to organise tabular or numeric information						
7. Select and apply heading styles to text						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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Countersigning assessor signature (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

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Countersigning internal verifier (if applicable): \_\_\_\_\_ Date: \_\_\_\_\_

**Element 3: Use word processing software tools to format and present documents**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
8. Select and use appropriate techniques to format characters and paragraphs						
9. Select and use appropriate page layout to present and print documents						
10. Check documents meet needs, using IT tools and making corrections as necessary						

**Additional evidence (if applicable):**

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	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
	P = products of the learner's work	WT = authentic statements/witness testimony
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Internal verifier signature: \_\_\_\_\_ Date: \_\_\_\_\_

## **Unit 80: Using Email 1**

**Unit code:** S113

**Unit credit:** 2

**Unit level:** 4

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### **Introduction**

Understand and use a range of basic e-mail software tools to send, receive and store messages for straightforward or routine activities. Any aspect that is unfamiliar will require support and advice from others. This standard is imported from the **e-skills IT Users suite**.

### **Specific skills:**

- Communicating
- Presenting information
- Using technology



Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
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Candidate signature: \_\_\_\_\_ Date: \_\_\_\_\_

I confirm that the candidate has achieved all the requirements of this Unit.

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**Element 1: Use e-mail software tools and techniques to compose and send messages**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Use software tools to compose and format e-mail messages						
2. Attach files to e-mail messages						
3. Send e-mail messages						
4. Use an address book to store and retrieve contact information						

**Additional evidence (if applicable):**

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
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	P = products of the learner's work	WT = authentic statements/witness testimony
	RA = personal statements and/or reflective accounts	EPW = expert witness testimony
	S = outcome from simulation, where permitted by the assessment strategy	RPL = evidence of recognition of prior learning

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**Element 2: Manage incoming email effectively**

**What you must do**

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
5. Follow guidelines and procedures for using e-mail						
6. Read and respond to e-mail messages appropriately						
7. Organise and store e-mail messages						
8. Respond appropriately to common email problems						

**Additional evidence (if applicable):**

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Column key:	P = products of the learner's work	WT = authentic statements/witness testimony
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## Unit 81:

## Calculate Pay

Unit code:

S125

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### Introduction

Calculate employees' gross and net pay, which includes: calculating gross pay; processing entitlements and deductions; and resolving employees' queries about their pay. This standard is imported from the **FSSC Accountancy and Finance suite**.

### Specific skills:

- Checking
- Managing time
- Communicating
- Using technology
- Monitoring
- Problem Solving

## What you must know

To achieve this element you must give sufficient evidence to demonstrate your knowledge and understanding for each standard.

Knowledge	Type of evidence	Date
<b>Element 1: Types of Payroll</b>		
A. Negative payrolls (those where employees will be paid automatically unless action is taken to prevent payment);		
B. Positive payrolls (those where employees will not be paid unless individual payments are specifically instructed in the system).		
<b>Element 2: The Statutory Framework</b>		
C. Legislation relating to payroll processing and data protection;		
D. Types of temporary variations;		
E. Sources of authorisation;		
F. Types of statutory additions to pay;		
G. Types of pre-tax deductions;		
H. Types of statutory and non-statutory deductions.		
<b>Element 3: The Organisation</b>		
I. How to check that the payment due is valid and authentic;		
J. The organisation's procedures and timeline for initiating, making and monitoring payments;		
K. The organisation's signatories and authorisations procedures;		
L. The organisation's procedures for maintaining the security and confidentiality of information;		
M. Organisational, external agency and employee requirements for information;		
N. Sources of information for resolving discrepancies.		

**Additional evidence (if applicable):**

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	<b>O = direct observation of the learner's performance by their assessor</b>	<b>PD = professional discussion</b>
	<b>Q&amp;A = outcomes from oral or written questioning</b>	<b>A = assignment, project/case studies</b>
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Calculate pay
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### What you must do

To achieve this element you must give sufficient evidence to demonstrate your competence for each standard.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
1. Check all data and documentation relating to temporary variations for accuracy, reasonableness and proper authorisation;						
2. Identify employees where action is required to ensure payment and correctly enter relevant details into the system;						
3. Check rates for overtime payments against agreed scales for each type of employee affected;						
4. Process temporary payments and deductions accurately and identify the appropriate tax and national insurance treatment for them as well as any effect they may have on pension contributions;						
5. Process termination payments in accordance with legislative requirements;						
6. Check the employment status of all employees and verify their entitlement to receive pay for the pay period;						
7. Enter any applicable pre-tax deductions and all relevant statutory and non-statutory voluntary or contractual deductions into the system;						
8. Produce and distribute accurate and legible payslips in accordance with statutory and organisational requirements;						

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
<b>To meet the national standard you must:</b>						
9. Check net pay totals to ensure that the full range of applicable allowances and deductions has been made;						
10. File source documents in a logical and orderly manner in accordance with statutory and organisational requirements;						
11. Effectively resolve queries relating to pay calculations in a polite, secure and timely manner;						
12. Refer enquiries to the appropriate person when you do not have the authority or expertise to resolve them;						
13. Maintain the security and confidentiality of data, particularly employees' personal details or other sensitive information, at all times.						

**Additional evidence (if applicable):**

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