edexcel

SVQ 3 in Business and Administration at SCQF Level 6

Logbook for candidates

SVQ

August 2012

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Section 1: SVQ 3 in Business and Administration at SCQF Level 6

Introduction

This document contains information specific to SVQ 3 in Business and Administration at SCQF Level 6.

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 3 in Business and Administration at SCQF Level 6 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

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 Edexcel 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 3 in Business and Administration at SCQF Level 6

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.

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What is the structure of the SVQ 3 in Business and Administration at SCQF Level 6?

To achieve the whole qualification at SCQF Level 3, you must prove competence in **three** mandatory units and **five** optional units.

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

- **three units** must be completed 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 B14:IT, C11:IT or C12:Finance
- **either** unit S311 (Group B3: Document Production) or S211 (Group C1:Document Production) may be selected **but not both**
- **only one unit** may be selected from unit S312 (Group B3:Document Production) or S212 (Group C1:Document Production) or S213 (Group C1:Document Production)
- **either** unit S313 (Group B3: Document Production) or S214 (Group C1: Document Production) may be selected, **but not both**
- **either** unit S314 (Group B3:Document Production) or S215 (Group C1:Document Production) may be selected, **but not both**
- **either** unit S319 (Group B4:Events and Meetings) or S222 (Group C2:Events and Meetings) may be selected, **but not both**
- **either** unit S320 (Group B4:Events and Meetings) or S224 (Group C2:Events and Meetings) may be selected, **but not both**
- **either** unit S321 (Group B4:Events and Meetings) or S223 (Group C2:Events and Meetings) may be selected, **but not both**
- **either** unit S226 or S414 may be selected from Group C5:Manage Information and Data, **but not both**
- **either** unit S315 (Group B7:Manage Information and Data) or S413 (Group C5:Manage Information and Data) may be selected, **but not both**
- **either** unit S323 (Group B9:Innovation and Change) or S419 (Group C7:Innovation and Change) may be selected, **but not both**
- **only one unit** may be selected from the following four: unit S339a or S339b (B13: IT) or S236a or S236b (C11: IT)
- **either** unit S340 (B14: IT) or S237 (C11: IT) may be selected **but not both**
- **either** unit S341 (B14: IT) or S238 (C11: IT) may be selected **but not both**
- **either** unit S342 (B14: IT) or S239 (C11: IT) may be selected **but not both**
- **either** unit S343 (B14: IT) or S240 (C11: IT) may be selected **but not both**
- **either** unit S344 (B14: IT) or S241 (C11: IT) may be selected **but not both**
- **either** unit S345 (B14: IT) or S242 (C11: IT) may be selected **but not both**
- **either** unit S346 (B14: IT) or S243 (C11: IT) may be selected **but not both.**

Mandatory units for the SVQ 3 in Business and Administration at SCQF Level 6

Group A: Mandatory core units

You must achieve **all** of the units listed below:

Unit number	Unit code	Title	Unit credit	SCQF level
1	S301	Plan how to manage and improve own performance in a business environment	4	6
2	S302	Review and maintain work in a business environment	4	6
3	S308	Communicate in a business environment	3	6

Optional units for the SVQ 3 in Business and Administration at SCQF Level 6

You must achieve **five** of the units listed below:

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

Group B

Unit number	Unit code	Title	Unit credit	SCQF level
B1: Work responsibilities				
4	S303	Solve business problems	4	6
5	S304	Support other people to work in a business environment	4	6
6	S305	Contribute to decision-making in a business environment	3	6
7	S306	Contribute to negotiations in a business environment	5	7
8	S307	Supervise a team in a business environment	6	7
9	S322	Supervise an office facility	5	6
B2: Project management				
10	S324	Contribute to running a project	5	6
B3: Document production				
11	S311	Design and produce documents in a business environment	4	6
12	S312	Prepare text from notes using touch typing (60 wpm)	4	6
13	S313	Preparing text from shorthand (80 wpm)	8	6
14	S314	Prepare text from recorded audio instruction (60 wpm)	4	6

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Unit number	Unit code	Title	Unit credit	SCQF level
B4: Events and meetings				
15	S319	Organise and co-ordinate events	8	6
16	S320	Plan and organise meetings	5	6
17	S321	Organise business travel or accommodation	5	6
B5: Customer service				
18	S325	Deliver, monitor and evaluate customer service to internal customers	3	6
19	S326	Deliver, monitor and evaluate customer service to external customers	3	6
B6: Communications				
20	S309	Develop a presentation	3	6
21	S310	Deliver a presentation	3	6
B7: Manage information and data				
22	S315	Support the design and development of information systems	7	6
23	S316	Monitor information systems	7	6
24	S317	Analyse and report data	6	6
B8: Business resources				
25	S318	Order products and services	5	7
26	S327	Agree a budget	4	6
B9: innovation and change				
27	S323	Contribute to innovation in a business environment	4	6
B12: Specialised business support services – education				
28	S329	Provide administrative support in schools	8	6
B13: Specialised business support services – parking				
29	S330	Administer parking and traffic challenges, representations and civil parking appeals	9	6
30	S331	Administer statutory parking and traffic appeals	9	7
31	S332	Administer parking and traffic debt recovery	6	7

Unit number	Unit code	Title	Unit credit	SCQF level
B14: IT				
32	S339a	Bespoke software 3	4	6
33	S339b	Specialist software 3	4	6
34	S340	Data management software 3	4	6
35	S341	Database software 3	6	6
36	S342	Improving productivity using IT 3	5	6
37	S343	IT security for users 3	3	6
38	S344	Presentation software 3	6	6
39	S345	Set up an IT system 3	5	6
40	S346	Spreadsheet software 3	6	6
41	S347	Using collaborative technologies 3	6	6
42	S348	Website software 3	5	6
43	S349	Word processing software 3	6	6
44	S350	Using email 3	3	6

Group C

Unit number	Unit code	Title	Unit credit	SCQF level
C1: Document production				
45	S211	Produce documents in a business environment	4	5
46	S212	Prepare text from notes	4	6
47	S213	Prepare text from notes using touch typing (40 wpm)	3	5
48	S214	Preparing text from shorthand (60 wpm)	8	5
49	S215	Prepare text from recorded audio instruction (40 wpm)	4	5
C2: Events and meetings				
50	S222	Support the organisation and co-ordination of events	5	5
51	S223	Support the organisation of business travel or accommodation	3	5
52	S224	Support the organisation of meetings	4	5

Unit number	Unit code	Title	Unit credit	SCQF level
C3: Customer service				
53	S209	Handle mail	3	5
54	S210	Provide reception services	3	5
55	S250	Meet and welcome visitors	3	5
C4: Communications				
56	S206	Use electronic message systems	1	5
57	S207	Use a diary system	3	5
58	S208	Take minutes	4	5
C5: Manage information and data				
59	S216	Organise and report data	3	5
60	S217	Research information	4	5
61	S218	Store and retrieve information	3	5
62	S219	Provide archive services	2	5
63	S226	Support the management and development of an information system	7	7
64	S413	Design and develop information systems	7	8
65	S414	Manage and evaluate information systems	6	8
C6: Business resources				
66	S220	Use office equipment	3	5
67	S221	Maintain and issue stationery stock items	3	5
68	S416	Manage budgets	5	7
C7: Innovation and change				
69	S225	Respond to change in a business environment	3	5
70	S419	Implement and evaluate innovation in a business environment	6	8
71	S420	Plan change for a team	6	8
C8: Specialised business support services – human resources				
72	S227	Administer HR records	3	5
73	S228	Administer the recruitment and selection process	4	5
C9: Specialised business support services – parking				
74	S251	Administer parking dispensations	4	5
C10: Health, safety and security of people premises and property				
75	S112	Use occupational and safety guidelines when using keyboards	2	4

Unit number	Unit code	Title	Unit credit	SCQF level
C11: IT				
76	S236a	Bespoke software 2	3	5
77	S236b	Specialist software 2	3	5
78	S237	Data management software 2	3	5
79	S238	Database software 2	4	5
80	S239	Improving productivity using IT 2	4	5
81	S240	IT security for users 2	2	5
82	S241	Presentation software 2	4	5
83	S242	Setting up an IT system 2	4	5
84	S243	Spreadsheet software 2	4	5
85	S244	Using collaborative technologies 2	4	5
86	S245	Website software 2	4	5
87	S246	Word processing software 2	4	5
88	S252	Using email 2	3	5
C12: Finance				
89	S125	Calculate pay	-	-
90	S247	Control payroll	-	-
91	S248	Account for income and expenditure	-	-
92	S249	Draft financial statements	-	-

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 3 in Business and Administration at SCQF Level 6.

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 candidate's 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

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

Example form 2 — Personal profile

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

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):	

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Example form 3 — Contents checklist

SVQ title: SVQ 3 in Business and Administration at SCQF Level 6		
Candidate:		
	Completed?	**Page/section number**
Title page for the portfolio		
Personal profile • your own personal details • a brief CV or career profile • description of your job • information about your employer/training provider/college		
Summary of the units		
Completed units • signed by yourself, your assessor and the internal verifier (where relevant) • reference numbers included • unit assessment plans		
Unit progress records		
Index of evidence (with cross-referencing information completed)		
Evidence (with reference numbers) • observation records • details of witnesses (witness testimony sheets) • personal statements		

Example form 4 — Index of evidence

SVQ title and level: SVQ 3 in Business and Administration at SCQF Level 6				
Candidate:				
Units/elements evidence links to *(give specific numbers, eg 5.2.1)*	**Evidence number**	**Description of evidence**	**Included in portfolio (Yes/No)** *If No, state location*	**Internal verifier signature and date of sampling**

Example form 5 — Unit assessment plan

SVQ title: SVQ 3 in Business and Administration at SCQF Level 6				
Unit:				
Candidate:			**Assessor:**	
Normal working activities performed				
	Typical evidence	**Work area**	**Expected completion date**	**Links to other units/elements**
Element:				
Element:				
Element:				
Activities needing to be performed				
Element:				
Element:				
Element:				
Additional comments				
Assessor's signature:			**Date:**	
Candidate's signature:			**Date:**	

Example form 6 — Unit sign-off record

SVQ title and level: SVQ 3 in Business and Administration at SCQF Level 6
Candidate:
Assessor:
To achieve the whole qualification, you must prove competence in Xxx **mandatory** units and Xxx **optional** units. **Unit checklist**: list here the units you will be undertaking, then circle the reference number of each unit as you complete it.

Mandatory									
Optional									

Mandatory units			
Unit number	**Title**	**Assessor's signature**	**Date**

continued overleaf…

Optional units			
Unit number	**Title**	**Assessor's signature**	**Date**

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Example form 7 — Work Log

SVQ title and level: SVQ 3 in Business and Administration at SCQF Level 6				
Unit/element(s):				
Candidate:				
Purpose of statement:				
Evidence index number:				
Date	**Evidence index number**	**Details of statement**	**Links to other evidence** *(enter numbers)*	**Units, elements and PCs covered**
Candidate's signature:			**Date:**	
Assessor's signature:			**Date:**	

Example form 8 — Observation record

SVQ title and level: SVQ 3 in Business and Administration at SCQF Level 6	
Unit/element(s):	
Candidate:	**Date of observation:**
Evidence index number:	
Skills/activities observed:	**PCs and range covered:**
Knowledge and understanding apparent from this observation:	
Other units/elements to which this evidence may contribute:	
Assessor comments and feedback to candidate:	
I can confirm the candidate's performance was satisfactory.	
Assessor's signature:	**Date:**
Candidate's signature:	**Date:**

Example form 9 — Witness testimony

SVQ title and level: SVQ 3 in Business and Administration at SCQF Level 6	
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:	

Please tick (✓) the appropriate box.	
	Qualified as an assessor for workplace performance
	Familiar with the SVQ standards to which the candidate is working

Example form 10 — Expert witness evidence record

SVQ title and level: SVQ 3 in Business and Administration at SCQF Level 6	
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:	

Please tick (✓) the appropriate box.	
	Qualified as an assessor for workplace performance
	Relevant professional work role that involves evaluating everyday staff practice
	Current expertise
	Familiar with the SVQ standards to which the candidate is working

Example form 11 — Record of questions and candidate's answers

SVQ title and level: SVQ 3 in Business and Administration at SCQF Level 6	
Candidate name:	
Unit:	**Element(s):**
Evidence index number:	
Circumstances of assessment:	
List of questions and candidate's responses:	
Q: **A:**	
Q: **A:**	
Assessor's signature:	**Date:**
Candidate's signature:	**Date:**

Section 3: Logbook

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Mandatory units

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Unit 1:	**Plan how to manage and improve own performance in a business environment**
Unit code:	S301
Unit credit:	4
Unit level:	6

Introduction

Plan how to take forward agreements to manage and improve own performance in a business environment.

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
Element 1: Plan and be accountable for own work		
A. How to plan own work and be accountable to others		
B. How to negotiate realistic targets for own work and the purpose and benefits of doing this		
C. How to prioritise targets and set timescales		
D. The purpose of keeping other people informed about progress		
E. The purpose of providing other people with sufficient notice if revisions to plans are needed		
F. How to acknowledge and learn from mistakes		
G. The relevant guidelines, procedures and codes of practice		
H. The purpose and value of setting high standards for own work and how to set these standards		
Element 2: Improve own performance		
I. The purpose and benefits of trying to continuously improve own work		
J. The purpose and benefits of encouraging and accepting feedback from others		
K. How to evaluate own work		
L. The purpose and benefits of testing out possible improvements to own work		
M. How learning and development can help to improve own work, benefit the organisation and further own career		
N. The main career progression routes available		
O. The learning and development opportunities that are available		
P. How to develop a learning plan		

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Knowledge	Type of evidence	Date
Element 3: Behave in a way that supports effective working		
Q. How to cope with pressure		
R. The value and benefits of being resilient when setbacks are experienced		
S. The purpose and benefits of being assertive, what this means and situations when you should be assertive		
T. The purpose and value of being ready to take on new challenges and adapt to change		
U. The value of treating others with honesty, respect and consideration		
V. Types of behaviour that show you are honest, respectful and considerate and the types of behaviour that show you are not		
W. How to help and support others and why this is important		

Additional evidence (if applicable):

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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
To meet the national standard you must:						
1. Negotiate and agree realistic targets for own work						
2. Prioritise targets and agree achievable timescales						
3. Plan how to make best use of own time and other resources needed and choose appropriate working methods						
4. Keep other people informed of progress						
5. Meet deadlines or re-negotiate targets, timescales and plans in good time						
6. Take responsibility for own work and accept responsibility for any mistakes made						
7. Reflect on and learn from own mistakes						
8. Follow agreed guidelines, procedures and, where appropriate, codes of practice						
9. Set high standards for own work and show drive and commitment to achieve these standards						

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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
To meet the national standard you must:						
10. Encourage and accept feedback from other people						
11. Evaluate own work and use feedback from other people to identify where to make improvements						
12. Identify ways to improve work, consistently put them into practice and test how effective they are						
13. Identify where further learning and development could improve performance						
14. Develop and follow through a learning plan that meets own needs						
15. Review progress and update plans for improvement and learning						

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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:						
16. Cope with pressure and overcome difficulties and setbacks						
17. Assert your own needs and rights when necessary						
18. Show a willingness to take on new challenges						
19. Adapt readily to change						
20. Treat other people with honesty, respect and consideration						
21. Help and support other people						

Additional evidence (if applicable):

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Unit 2:	**Review and maintain work in a business environment**
Unit code:	S302
Unit credit:	4
Unit level:	6

Introduction

Review and maintain the delivery of sustainability; respect diversity; maintain security and confidentiality; and, assess and manage risks in line with organisational requirements in a business environment.

Specific skills:

- Communicating
- Problem-solving
- Interpersonal skills
- Working with others
- 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
Element 1: Support sustainability		
A. The purpose and benefits of minimising waste in the workplace		
B. The main causes of waste in a business administration environment and how to minimise this waste		
C. Why recycling is important and the organisation's procedures for recycling		
D. The correct procedures for the disposal of hazardous materials and why it is important to follow these		
E. How regular maintenance of equipment can help to minimise waste		
F. How to use technology and other methods to work more efficiently		
G. How to select sources of materials and equipment that provide best value for money		
Element 2 : Support diversity		
H. The purpose and benefits of helping to develop and support colleagues so that they can work effectively and efficiently, and the benefits to the organisation		
I. What is meant by diversity and why diversity should be valued		
J. What advantages diversity can bring to an organisation		
K. How to be sensitive to people's individual needs and respect their abilities, background, values, customs and beliefs		
L. The ways in which it is possible to learn from others		
Element 3: Maintain security and confidentiality		
M. The purpose and benefits of maintaining security and confidentiality		
N. The legal and organisational requirements in relation to security and confidentiality		
O. The organisational procedures to follow if security and confidentiality is a concern		

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Knowledge	Type of evidence	Date
Element 4: Assess and manage risk		
P. The sources of risk in the work carried out, including health and safety		
Q. How to assess and monitor risk		
R. The methods to minimise risk		
S The purpose and value of learning from mistakes		

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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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
To meet the national standard you must:						
1. Keep waste to a minimum and follow procedures for the recycling and disposal of hazardous materials						
2. Follow procedures for maintenance of equipment						
3. Continuously review working methods, including the use of technology, and identify and progress ways of improving efficiency						
4. Choose sources of equipment and materials that provide best value for money						
5. Support colleagues to maximise their performance and value to the organisation						

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: 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
To meet the national standard you must:						
6. Interact with other people in a way that is sensitive to their individual needs and respects their background, abilities, values, customs and beliefs						
7. Learn from other people and use this to improve own way of working and interacting with others						
8. Follow organisational procedures and legislation in regard to anti-discrimination						

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: 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
To meet the national standard you must:						
9. Maintain the security of property in a way that is consistent with organisational procedures and legal requirements						
10. Maintain the security and confidentiality of information in a way that is consistent with organisational procedures and legal requirements						
11. Report any concerns about security and confidentiality to an appropriate person or agency						

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 4: Assess and manage risk

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. Identify and agree possible sources of risk						
13. Assess and confirm the level of risk						
14. Put in place ways of minimising the risk						
15. Monitor risk						
16. Be alert to new risks and manage these when they occur						
17. Review and learn from own experience of assessing and managing risk						

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 3: Communicate in a business environment

Unit code: S308

Unit credit: 3

Unit level: 6

Introduction

Communicate in writing and verbally in a business environment.

Specific skills:

- Analysing
- Reflecting
- Communicating
- 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
Element 1: Plan communication		
A. Communication, the audience and the outcomes to be achieved		
B. Methods of communication and situations in which to use them		
Element 2 : Communicate in writing		
C. Relevant sources of information		
D. The principles of 'netiquette' in electronic communications		
E. How to use language appropriate to the audience and the purpose of the communication		
F. How to organise, structure and present information to different audiences		
G. How to check the accuracy of the information		
H. How to use grammar, punctuation and spelling accurately		
I. How to write in Plain English		
J. The reasons for proofreading or checking work		
K. How to recognise when work is urgent or important		
L. The organisation's procedures for filing written work		

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Knowledge	Type of evidence	Date
Element 3: Communicate verbally		
M. How to present information and ideas clearly		
N. Ways of contributing to discussions to achieve objectives and how to adapt contributions to suit different audiences, purposes and situations		
O. How to use and interpret body language and tone of voice		
P. Methods of active listening		
Q The reasons for summarising communication		
Element 4: After communication		
R How to seek feedback on whether the communication achieved its purpose		
S The benefits of reflecting on the outcomes of communication and of identifying ways to further develop communication skills		

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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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, the audience and the outcomes to be achieved						
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
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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
To meet the national standard you must:						
3. Identify sources of information that support the purpose of the communication						
4. Select information that supports the purpose of the communication						
5. Present the information using a format, layout, style and house style that is appropriate to the subject matter, work situation and communication channel						
6. Use language that is appropriate to the audience and the purpose of the communication						
7. Organise, structure and present information to suit different audiences						
8. Select and read written material that contains information that is needed						
9. Identify and extract the main points needed from written material						
10. Use accurate grammar, punctuation and spelling to make sure that meaning is clear						
11. Proofread or check work and make any necessary amendments						
12. Evaluate written material to identify how well it met its purpose						

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
13. Produce the communication to meet deadlines recognising the difference between what is important and what is urgent						
14. Keep a file copy of all communication						

Additional evidence (if applicable):

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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
To meet the national standard you must:						
15. Present information and ideas clearly to others						
16. Make contributions to discussions that suit the audience, purpose and situation						
17. Use appropriate body language and voice tone						
18. Listen actively to information that other people are communicating and respond appropriately						
19. Ask relevant questions to clarify anything not understood						
20. Summarise the communication with the person/people being communicated with to make sure the correct meaning has been understood						

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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:						
21. Seek feedback on whether the communication achieved its purpose						
22 Reflect on outcomes of communication and identify ways to develop communication skills further						

Additional evidence (if applicable):

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Optional units

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Unit 4: Solve business problems

Unit code: S303

Unit credit: 4

Unit level: 6

Introduction

Identify, analyse, plan and solve business problems.

Specific skills:

- Analysing
- Organising
- Working with others
- Communicating
- Planning
- Decision-making
- Evaluating
- 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
For the whole unit		
A. How to recognise when a business problem exists		
B. How to identify the potential causes of a business problem		
C. How to analyse business problems		
D. Problem-solving techniques		
E. Organisational policies and procedures that need to be taken into account		
F. Legal or regulatory requirements that may need to be taken into account		
G. Planning techniques		
H. Reasons for using support and feedback from others		
I. The purpose and benefits of systematically reviewing progress and adjusting plans as necessary		
J. How to recognise when the business problem has been solved		
K. How to evaluate the approach to solving the business problem		

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Additional evidence (if applicable):

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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
To meet the national standard you must:						
1. Recognise when a business problem exists						
2. Confirm the business problem is understood						
3. Identify reasons for the business problem occurring						
4. Analyse the business problem, gathering additional information as necessary						
5. Discuss the business problem with others						
6. Develop and justify an approach to solving the business problem						
7. Plan chosen approach to solving the business problem						
8. Decide how to recognise when the business problem has been solved						
9. Agree the plan with the appropriate authority						
10. Put the plan into action						
11. Use support and feedback from others to help solve the business problem						
12. Systematically review progress towards solving the business problem, adjusting the plan as necessary						

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
13. Evaluate the approach towards solving the business problem, evaluating other approaches which may have been more productive						

Additional evidence (if applicable):

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Unit 5: Support other people to work in a business environment

Unit code: S304

Unit credit: 4

Unit level: 6

Introduction

Work with other people to achieve team and organisational goals and objectives.

Specific skills:

- Communicating
- Planning
- Managing time
- Resolving disagreement
- Negotiating
- Team working
- 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
For the whole unit		
A. The sector in which your organisation operates		
B. Your organisation's mission and purpose		
C. How your organisation compares to other organisations in the sector		
D. Your main responsibilities at work		
E. How your role fits into your organisation's structure and contributes to its operation		
F. The policies, procedures, systems and values of your organisation that are relevant to your role		
G. How to apply your organisation's values and policies		
H. The purpose and benefits of sharing work goals and plans when working with others		
I. The situations in which working with others can achieve positive outcomes		
J. The purpose of giving and receiving constructive feedback		
K. How to make use of feedback to improve the work of others and the work of the team as a whole		
L. How you can help to improve policies, objectives, systems and values in a way that is consistent with your role		
M. Who you should consult if you are unsure about policies, objectives, systems and values		
N. The purpose of acknowledging the strengths of others and of balancing your abilities with theirs		
O. The situations in which team members might need support		
P. The value of diversity in teams		
Q. The purpose and value of respecting others		
R. The purpose of agreeing quality measures		

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Knowledge	Type of evidence	Date
For the whole unit		
S. Different methods of communication and when to use them		
T. How to protect and improve the image of the organisation when working with outside organisations and individuals		
U. When it is essential to communicate with others within the team		
V. The types of problems and disagreements that occur when working with others and how to resolve them within the limits of own authority		

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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Support other people to work 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
To meet the national standard you must:						
1. Work in a way that supports your organisation's overall mission and your team's objectives						
2. Welcome opportunities to work with other people to achieve positive outcomes						
3. Follow policies, systems and procedures relevant to your job						
4. Put your organisation's values into practice in all aspects of your work						
5. Share work goals and plan work objectives together						
6. Share feedback with others on the achievement of objectives						
7. Contribute to improving objectives, policies, systems, procedures and values in a way that is consistent with your role						
8. Seek guidance from others when you are unsure about objectives, policies, systems, procedures and values						
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						

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
12. Produce quality work on time						
13. Work with outside organisations and individuals in a way that protects and improves the image of your organisation						
14. Communicate with other people						
15. Identify and refer problems and disagreements						

Additional evidence (if applicable):

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Unit 6: Contribute to decision-making in a business environment

Unit code: S305

Unit credit: 3

Unit level: 6

Introduction

Contribute information and ideas to influence the decision-making process.

Specific skills:

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

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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
For the whole unit		
A. Key stages in the decision-making process		
B. The context in which the decision is being made		
C. Own role in assisting decision-making, its scope and limitations		
D. Sources of information useful for influencing decision-making		
E. How to research information		
F. How to contribute to meetings and other discussions where decisions are being made		
G. The purpose and benefits of respecting other people's contributions to the decision-making process		
H. How to engage proactively with colleagues during decision-making		
I. How to use evidence, argument, questioning and assertiveness to influence outcomes		
J. The concept of collective responsibility and why it is important		

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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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Countersigning internal verifier (if applicable): _____ Date: _____

Contribute to decision-making 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
To meet the national standard you must:						
1. Research information to add value to the decision-making process						
2. Use accurate and current information to develop ideas to present to others						
3. Make constructive, relevant and timely contributions to meetings or other discussions to aid decision-making						
4. Respond positively when asked to supply information to help with decision-making						
5. Contribute to identifying decision-making criteria						
6. Structure ideas, information and recommendations in a way that helps other people understand						
7. Proactively engage with colleagues involved in the decision-making process and respect their contributions						
8. Influence decision-making by using evidence, argument, questioning and assertiveness						
9. Show support for the decision even when not in agreement						

Additional evidence (if applicable):

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Unit 7: Contribute to negotiations in a business environment

Unit code: S306

Unit credit: 5

Unit level: 7

Introduction

Prepare and take part in negotiations to achieve planned objectives.

Specific skills:

- Communicating
- Making proposals
- Negotiating
- Reporting
- Planning
- Researching
- 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
For the whole unit		
A. The principles of negotiation		
B. The process of negotiation and how negotiation is used in business		
C. Commercial and ethical frameworks that are considered important in negotiations		
D. Negotiation strategies and techniques		
E. The role(s) and level(s) of responsibility of work colleagues prior to negotiations		
F. The benefits of having clear and realistic objectives and preparing compromise positions		
G. Job role level of responsibility and authority in the negotiation process		
H. The purpose and benefits of being flexible during negotiations while still seeking to achieve principal objectives		
I. The purpose of keeping to the brief and level of authority during negotiations		
J. Senior decision-makers to whom to refer issues when the issue is above own authorisation level		
K. How to maintain goodwill during negotiations and the benefits of achieving this		
L. The purpose and benefits of keeping accurate records of negotiations		

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Additional evidence (if applicable):

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Contribute to negotiations 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
To meet the national standard you must:						
1. Prepare a negotiating brief for all relevant matters						
2. Identify potential problems in negotiations and suggest solutions to overcome them						
3. Make proposals which meet personal/organisation objectives and those of the people being negotiated with						
4. Clarify other people's understanding and respond to their queries and objections						
5. Suggest solutions to deal with problems						
6. Work within the limits of job role, responsibility and authorisation						
7. Refer the negotiation to senior decision-makers when matters arise which require a higher level of authority to agree						
8. Reach an agreement to the mutual satisfaction of all those involved in the negotiations, where possible						
9. Conduct negotiations in a way which creates goodwill and promotes a positive image of self and the organisation						
10. Maintain clear and accurate records of the negotiations and outcomes and agree them with all involved						

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
11. Complete negotiations in a way that maintains goodwill and promotes a positive image of self and an organisation						

Additional evidence (if applicable):

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Unit 8: Supervise a team in a business environment

Unit code: S307

Unit credit: 6

Unit level: 7

Introduction

Supervise a team by planning and implementing work and supporting team members to help achieve agreed goals and objectives.

Specific skills

- Communicating
- Problem-solving
- Managing time
- Resolving disagreement
- Negotiating
- Scheduling
- Planning
- Team working

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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
For the whole unit		
A. The purpose and benefits of working with other people to achieve agreed goals and objectives		
B. The situations in which supervision of others can achieve positive outcomes		
C. Different methods of communication and when to use them within the team		
D. When it is essential to communicate with others in the team		
E. The purpose and benefits of work goals and plans		
F. How to schedule activities and resources for the team		
G. The purpose and benefits of acknowledging the strengths of others and building on team abilities and potential		
H. The value and benefits of diversity in teams		
I. The situations in which team members might need support and how to provide this		
J. The purpose and benefits of respecting others as individuals within the team		
K. The purpose and benefits of agreeing quality measures with others		
L. The types of problems and disagreements that occur when working with others and how to resolve them		
M. The purpose of work assessment		
N. How to assess the work of teams and team members		
O. The purpose and benefits of providing opportunities to team members to assess their own work		
P. The purpose and benefits of giving and receiving constructive feedback with other team members		
Q. How to make use of feedback to improve the work of others and the work of the team as a whole		

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Knowledge	Type of evidence	Date
For the whole unit		
R. How to resolve problems		

Additional evidence (if applicable):

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Element:Supervise a team 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
To meet the national standard you must:						
1. Communicate with other people in the team						
2. Supervise others to achieve agreed outcomes						
3. Plan and implement work goals, objectives, priorities and responsibilities with others						
4. Schedule activities and resources						
5. Make best use of abilities and potential within a team						
6. Provide support to team members						
7. Show respect for individuals in the team						
8. Supervise the achievement of quality standards within agreed timescales						
9. Work with team members to identify and solve problems and disagreements						
10. Assess work periodically to improve team performance						
11. Give team members opportunities to assess their own work						
12. Share feedback with others on the achievement of objectives and make suggestions and encouragement for improving their work						

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
13. Resolve problems as required						

Additional evidence (if applicable):

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Unit 9: Supervise an office facility

Unit code: S322

Unit credit: 5

Unit level: 6

Introduction

Maintain office equipment, resources and facilities to meet the needs of office users.

Specific skills:

- Checking
- Interpersonal skills
- Organising
- Communicating
- Managing time
- Planning
- Developing others
- Monitoring
- Prioritising
- Evaluating
- Negotiating
- 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
For the whole unit		
A. The benefits of providing and maintaining an office facility that caters for the needs of its users in line with agreed budget(s)		
B. The range of office facilities, equipment and resources and what they can be used for		
C. The purpose and value of identifying and regularly reviewing the needs of office users and methods used		
D. The purpose of office systems and procedures		
E. How to identify office facilities and equipment in need of repair or replacement		
F. The types of office systems and procedures appropriate to own responsibilities		
G. The purpose and benefits of building relationships with suppliers, and how to do so		
H. Why health, safety and security are important to an office environment		
I. The main health, safety and security requirements that are important to an office environment		
J. The types of problems that arise when supervising an office facility and how to deal with them		
K. The purpose of communicating office systems and procedures and providing users with information, guidance and support		
L. The purpose and benefits of monitoring office facilities and the types of activities to monitor		

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Supervise an office facility

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 and agree the needs of office facility users						
2. Maintain office facilities and equipment to meet the needs of users and keep within agreed budget(s)						
3. Supervise the use of office resources						
4. Use and review office systems and procedures						
5. Make sure office equipment is working efficiently						
6. Identify office facilities and equipment in need of repair or replacement						
7. Build and maintain relationships with suppliers						
8. Contribute to reviewing the office environment in line with health, safety and security policy						
9. Resolve problems in a timely manner						
10. Provide information and guidance on office facilities						
11. Communicate priorities to office facility users						
12. Monitor the use of office facilities						

Additional evidence (if applicable):

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Unit 10: Contribute to running a project

Unit code: S324

Unit credit: 5

Unit level: 6

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

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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
For the whole unit		
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		

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Additional evidence (if applicable):

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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
To meet the national standard you must:						
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):

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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
To meet the national standard you must:						
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						

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Additional evidence (if applicable):

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Unit 11: Design and produce documents in a business environment

Unit code: S311

Unit credit: 4

Unit level: 6

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
For the whole unit		
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		

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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: _____

Element 1: 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
To meet the national standard you must:						
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):

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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 12: Prepare text from notes using touch typing (60 wpm)

Unit code: S312

Unit credit: 4

Unit level: 6

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
For the whole unit		
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):

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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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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 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
To meet the national standard you must:						
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						

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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 13: Prepare text from shorthand (80 wpm)

Unit code: S313

Unit credit: 8

Unit level: 6

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
For the whole unit		
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):

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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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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 1: 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						

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Additional evidence (if applicable):

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Unit 14: Prepare text from recorded audio instruction (60wpm)

Unit code: S314

Unit credit: 4

Unit level: 6

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):

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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: _____

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						

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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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Unit 15: Organise and co-ordinate events

Unit code: S319

Unit credit: 8

Unit level: 6

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
For the whole unit		
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		

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Additional evidence (if applicable):

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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
To meet the national standard you must:						
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
To meet the national standard you must:						
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):

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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						

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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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Unit 16: Plan and organise meetings

Unit code: S320

Unit credit: 5

Unit level: 6

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
For the whole unit		
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		

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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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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
To meet the national standard you must:						
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):

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
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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
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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
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):

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Unit 17: Organise business travel or accommodation

Unit code: S321

Unit credit: 5

Unit level: 6

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
For the whole unit		
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		

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Additional evidence (if applicable):

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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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Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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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
To meet the national standard you must:						
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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Unit 18:	**Deliver, monitor and evaluate customer service to internal customers**
Unit code:	S325
Unit credit:	3
Unit level:	6

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
For the whole unit		
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		
F. The types of quality standards appropriate to own responsibilities		
G. How to set and meet timescales and quality standards with internal customers		
H. The purpose and benefits of monitoring internal customer satisfaction and how to do so		
I. The types of problems that internal customers may experience and how to process and resolve or refer them		
J. The correct procedures to follow when handling complaints		
K. The techniques for collecting and analysing internal customer feedback		
L. The purpose and benefits of continuous improvement		

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Additional evidence (if applicable):

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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
To meet the national standard you must:						
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):

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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Internal verifier signature: _____ Date: _____

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
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 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):

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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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):

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Unit 19: Deliver, monitor and evaluate customer service to external customers

Unit code: S326

Unit credit: 3

Unit level: 6

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
For the whole unit		
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		

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Additional evidence (if applicable):

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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
To meet the national standard you must:						
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):

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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):

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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
To meet the national standard you must:						
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):

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Unit 20: Develop a presentation

Unit code: S309

Unit credit: 3

Unit level: 6

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
For the whole unit		
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):

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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
To meet the national standard you must:						
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						

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Additional evidence (if applicable):

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Unit 21: Deliver a presentation

Unit code: S310

Unit credit: 3

Unit level: 6

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
For the whole unit		
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		

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Deliver 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
To meet the national standard you must:						
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
To meet the national standard you must:						
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):

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Unit 22: Support the design and development of information systems

Unit code: S315

Unit credit: 7

Unit level: 6

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
For the whole unit		
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		

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Additional evidence (if applicable):

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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
To meet the national standard you must:						
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):

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Unit 23: Monitor information systems

Unit code: S316

Unit credit: 7

Unit level: 6

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
For the whole unit		
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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Monitor 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
To meet the national standard you must:						
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						

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Unit 24: Analyse and report data

Unit code: S317

Unit credit: 6

Unit level: 6

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
For the whole unit		
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):

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Analyse and report 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
To meet the national standard you must:						
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						

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Unit 25: Order products and services

Unit code: S318

Unit credit: 5

Unit level: 7

Introduction

Identify and obtain relevant products and services to meet agreed specifications as negotiated with suppliers to achieve best value for money.

Specific skills:

- Communicating
- Problem-solving
- Evaluating
- Researching
- Monitoring
- 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
For the whole unit		
A. The organisational needs and priorities regarding procurement		
B. Sources of information on products and services relevant to own area of work and how to use these		
C. How to write a specification for a product or service		
D. Different sources of quality products and services		
E. How to select products and services that represent best value for money		
F. How to negotiate best value for money		
G. The organisational procurement procedures, including its policy on the acceptance of gifts and hospitality		
H. How to create and maintain positive working partnerships with suppliers		
I. How supply chains work		
J. How to monitor and evaluate procurement procedures		
K. The actions that may improve efficiency and obtain better value for money		

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Order products and 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:						
1. Keep up to date with products and services relevant to own area of work						
2. Develop and agree a budget and specification for the products or services to be ordered						
3. Identify quality products and services that meet the specification						
4. Identify the product or service which represents best value for money						
5. Procure products or services following organisational procedures						
6. Negotiate with selected suppliers to reach an agreement which offers good value for money and is acceptable to both parties						
7. Agree a contract for the product or service, if required						
8. Create and maintain partnerships with suppliers to improve quality and cut costs						
9. Monitor the performance of suppliers in line with the terms of the contract						
10. Follow the correct procedures to deal with problems						

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
11. Monitor and evaluate procurement procedures as needed						
12. Take action to improve efficiency and obtain better value for money						

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Unit 26: Agree a budget

Unit code: S327

Unit credit: 4

Unit level: 6

Introduction

Identify and negotiate the financial resources required to agree a budget.

Specific skills:

- Analysing
- Prioritising
- Monitoring
- Problem-solving
- Negotiating
- 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
For the whole unit		
A. The different types of budgetary systems and their features		
B. How to use estimates in developing draft budgets		
C. How to identify the financial resources needed to achieve aims and objectives and the purpose and value of this		
D. The purpose and benefits of evaluating and justifying estimated costs		
E. How to negotiate and agree budgets with decision-makers		

Additional evidence (if applicable):

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Agree a budget

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 financial resources needed to meet goals and objectives						
2. Evaluate and justify costs and associated risks						
3. Plan a draft budget						
4. Negotiate and agree the budget with decision-makers						

Additional evidence (if applicable):

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Unit 27: Contribute to innovation in a business environment

Unit code: S323

Unit credit: 4

Unit level: 6

Contribute to improving working methods, services or products in a business environment.

Specific skills:

- Analysing
- Organising
- Questioning
- Communicating
- Persuading
- Evaluating
- Planning
- Negotiating
- 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
For the whole unit		
A. The purpose of innovation in staying competitive and offering new solutions to established problems		
B. How to review existing ways of working, services and products in a way that is likely to achieve required results		
C. How to help research possible improvements		
D. How to question assumptions to develop concepts and propositions		
E. How to communicate and sell ideas to others		
F. How to decide when an idea is, or is not, feasible		
G. How to approach decision-makers		
H. The purpose of reflecting on and learning from mistakes		

Additional evidence (if applicable):

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Contribute to innovation 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
To meet the national standard you must:						
1. Constructively question existing ways of working within own area of work						
2. Help to research and identify possible improvements to working methods, services or products						
3. Help gather information to develop ideas						
4. Contribute to the evaluation of ideas based on agreed criteria, including their fit with organisational aims and objectives						
5. Ask appropriate questions to extend own thinking and question own assumptions						
6. Communicate and sell ideas to others						
7. Take feedback into account and show a willingness to compromise						
8. Contribute to deciding if an idea is feasible						

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Unit 28: Provide administrative support in schools

Unit code: S329

Unit credit: 8

Unit level: 6

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
For the whole unit		
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)		

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Knowledge	Type of evidence	Date
For the whole unit		
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		

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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
To meet the national standard you must:						
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						

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Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
13. Refer issues beyond your authority to the appropriate person						

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Unit 29: Administer parking and traffic challenges, representations and civil parking appeals

Unit code: S330

Unit credit: 9

Unit level: 6

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
For the whole unit		
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		

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Knowledge	Type of evidence	Date
For the whole unit		
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		

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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
To meet the national standard you must:						
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						

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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.

Performances	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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						

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Assessor signature: _____ Date: _____

Countersigning assessor signature (if applicable): _____ Date: _____

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Unit 30: Administer statutory parking and traffic appeals

Unit code: S331

Unit credit: 9

Unit level: 7

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

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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
For the whole unit		
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		

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Knowledge	Type of evidence	Date
For the whole unit		
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):

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 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
To meet the national standard you must:						
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						

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Additional evidence (if applicable):

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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
To meet the national standard you must:						
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):

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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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
To meet the national standard you must:						
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						

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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 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.

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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
	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 31: Administer parking and traffic debt recovery

Unit code: S332

Unit credit: 6

Unit level: 7

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
For the whole unit		
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		

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Knowledge	Type of evidence	Date
For the whole unit		
P. How to close a case in line with your organisational policy and relevant legislation		

Additional evidence (if applicable):

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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
To meet the national standard you must:						
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
To meet the national standard you must:						
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):

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Unit 32: Bespoke software 3

Unit code: S339a

Unit credit: 4

Unit level: 6

Introduction

Select and use a range of advanced bespoke software tools and techniques for complex or non-routine information. 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
For the whole unit		
A. Evaluate the use of software functions to structure, layout and style 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 1: Input and combine information using bespoke 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
To meet the national standard you must:						
1. Input relevant information accurately so that it is ready for processing						
2. Select and use appropriate techniques to link and combine information within the application and across different software applications						

Additional evidence (if applicable):

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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: Create and modify 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
To meet the national standard you must:						
3. Create, change and use appropriate structures and/or layouts to organise information efficiently						
4. Manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available						

Additional evidence (if applicable):

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	P = products of the learner's work	WT = authentic statements/witness testimony
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Element 3: Exploit 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
To meet the national standard you must:						
5. Select and use appropriate tools and techniques to edit, analyse and format information						
6. Check information meets needs, using IT tools and making corrections as necessary						
7. Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs						
8. Select and use presentation methods to aid clarity and meaning						

Additional evidence (if applicable):

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Unit 33: Specialist software 3

Unit code: S339b

Unit credit: 4

Unit level: 6

Introduction

Select and use a range of advanced specialist software tools and techniques for complex or non-routine information. 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
For the whole unit		
A. Evaluate the use of software functions to structure, layout and style 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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Element 1: Input and combine information using 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
To meet the national standard you must:						
1. Input relevant information accurately so that it is ready for processing						
2. Select and use appropriate techniques to link and combine information within the application and across different software applications						

Additional evidence (if applicable):

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Element 2: Create and modify 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
To meet the national standard you must:						
3. Create, change and use appropriate structures and/or layouts to organise information efficiently						
4. Manage data files effectively, in line with local and/or legal guidelines and conventions for the storage and use of data where available						

Additional evidence (if applicable):

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Element 3: Exploit 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
To meet the national standard you must:						
5. Select and use appropriate tools and techniques to edit, analyse and format information						
6. Check information meets needs, using IT tools and making corrections as necessary						
7. Identify and respond appropriately to quality problems to ensure that outcomes are fit for purpose and meet needs						
8. Select and use presentation methods to aid clarity and meaning						

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Additional evidence (if applicable):

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Unit 34: Data management software 3

Unit code: S340

Unit credit: 4

Unit level: 6

Introduction

Select and use advanced data management software tools and techniques efficiently to:

- enter complex information;
- retrieve information using complex selection criteria;
- produce customised reports from the system; and
- set up menus or short cuts.

The data management system tools, functions and techniques will be described as 'advanced' because:

- the software tools and functions involved will be complex and at times involve having the idea that there may be a tool or function to do something (eg improve efficiency or create an effect), exploring technical support, self-teaching and applying; and
- the input, manipulation and output techniques involved will be complex, which will involve research, identification and application.

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
For the whole unit		
A. Discuss when and how to change or create a new data entry form		
B. Discuss and explain how to locate and amend data records		
C. Evaluate and explain the risks to data security and procedures used for data protection		
D. Determine and explain what queries and reports need to be run to output the required information		

Additional evidence (if applicable):

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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
To meet the national standard you must:						
1. Enter data accurately into records to meet requirements						
2. Configure characteristics of groups of records						
3. Check data records meet needs, using IT tools and making corrections as necessary						
4. Interpret and respond appropriately to a range of data and application error messages						
5. Manage data files effectively, in line with local and/or legal guidelines for the storage and use of data where available						

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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
To meet the national standard you must:						
6. Create and use queries to search for and retrieve information from the system						
7. Create, define and set up reports to output information to meet requirements						
8. Use the file handling techniques of the software to import and export data						
9. Use available techniques to combine and link data						

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Unit 35: Database software 3

Unit code: S341

Unit credit: 6

Unit level: 6

Introduction

Select and use advanced database software tools and techniques efficiently to:

- enter complex information into databases;
- retrieve information by creating queries using multiple selection criteria; and
- produce reports by setting up menus or short cuts.

Also, be able to design, create and interrogate multiple-table relational databases.

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
For the whole unit		
A. Explain how a relational database design enables data to be organised and queried		
B. Explain why and how to maintain data integrity		
C. Explain how to select, generate and output information from queries according to requirements		

Additional evidence (if applicable):

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Element 1: Plan, create and modify relational database tables 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
To meet the national standard you must:						
1. Plan and create multiple tables for data entry with appropriate fields and properties						
2. Set up and modify relationships between database tables						
3. Respond appropriately to problems with database tables						
4. Use database tools and techniques to ensure data integrity is maintained						

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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
To meet the national standard you must:						
5. Design and create forms to access, enter, edit and organise data in a database						
6. Select and use appropriate tools and techniques to format data entry forms						
7. Check data entry meets needs, using IT tools and making corrections as necessary						
8. Respond appropriately to data entry errors						

Additional evidence (if applicable):

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Element 3: Use database software tools to create, edit and run data 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
To meet the national standard you must:						
9. Create and run database queries to display, amend or calculate selected data						
10. Plan and produce database reports from a multiple-table relational database						
11. Select and use appropriate tools and techniques to format database reports						
12. Check reports meet needs, using IT tools and making corrections as necessary						

Additional evidence (if applicable):

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Unit 36: Improving productivity using IT 3

Unit code: S342

Unit credit: 5

Unit level: 6

Introduction

Plan and review their use of predefined or commonly used IT tools for activities most of which are complex and non-routine. As a result of reviewing their work, an individual will be able to devise solutions in the use of IT tools in order to improve productivity. They will take considerable responsibility and autonomy, and be prepared to offer support and advice to others. 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
For the whole unit		
A. Explain the purpose for using IT		
B. Analyse the methods, skills and resources required to complete the task successfully		
C. Analyse any factors that may affect the task		
D. Critically compare alternative methods to produce the intended outcome		
E. Explain why different software applications could be chosen to suit different tasks, purposes and outcomes		
F. Explain any legal or local guidelines or constraints which apply to the task or activity		
G. Critically compare the strengths and weaknesses of own and other people's final work		
H. Explain different ways to make further improvements to work		
I. Evaluate the productivity and efficiency of IT systems and procedures used by self and others		
J. Research and advise on ways to improve productivity and efficiency		

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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
To meet the national standard you must:						
1. Plan, select and use appropriate IT systems and software for different purposes						
2. Plan, select and use appropriate IT systems and software for different purposes						

Additional evidence (if applicable):

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Element 2: Evaluate the selection and use of IT tools 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. Evaluate and test solutions to make sure they match requirements and are fit for purpose						
5. Be prepared to give feedback on other people's selection and use of IT tools						

Additional evidence (if applicable):

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Element 3: Devise solutions to improve the use of IT tools and systems for self and others

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. Develop solutions that make a demonstrable improvement to the use of IT tools and systems						
7. Test solutions to make sure that they work as intended						
8. Recommend improvements to IT systems and procedures that increase productivity						

Additional evidence (if applicable):

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Unit 37: IT Security for users 3

Unit code: S343

Unit credit: 3

Unit level: 6

Introduction

Monitor potential risks and take steps to protect their own and others' systems, data and software (eg from unauthorised remote access, disaster recovery or contingency planning). 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
For the whole unit		
A. Evaluate the security issues that may threaten system performance		
B. Evaluate the threats to system and information security and integrity		
C. Explain why and how to minimise security risks to hardware, software and data for different users		

Additional evidence (if applicable):

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Element 1: Select, use and develop appropriate procedures to monitor and 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
To meet the national standard you must:						
1. Select, use and evaluate a range of security precautions to protect IT systems and monitor security						
2. Manage access to information sources securely to maintain confidentiality, integrity and availability of information						
3. Apply, maintain and develop guidelines and procedures for the secure use of IT						
4. Select and use effective backup and archiving procedures for systems and data						

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Unit 38: Presentation software 3

Unit code: S344

Unit credit: 6

Unit level: 6

Introduction

Select and use a wide range of advanced presentation software tools and techniques effectively to produce presentations that are complex or non-routine. 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
For the whole unit		
A. Explain what types of information are required for the presentation		
B. Identify any constraints which may affect the presentation		
C. Explain when and how to use and change slide structure and themes to enhance presentations		
D. Explain how interactive and presentation effects can be used to aid meaning or impact		
E. Explain how to present slides to communicate effectively for different contexts		
F. Evaluate presentations, identify any quality problems and discuss how to respond to them		

Additional evidence (if applicable):

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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
To meet the national standard you must:						
1. Enter text and other information using layouts appropriate to type of information						
2. Insert charts and tables and link to source data						
3. Insert images, video or sound to enhance the presentation						
4. Organise and combine information for presentations in line with any constraints						
5. Store and retrieve presentation files effectively, in line with local guidelines and conventions where available						

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Element 2: Use presentation software tools to structure, edit and format presentations

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. Create, amend and use appropriate templates and themes for slides						
7. Select and use appropriate techniques to edit and format presentations to meet needs						
8. Create and use interactive elements to enhance presentations						
9. Select and use animation and transition techniques appropriately to enhance presentations						

Additional evidence (if applicable):

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Element 3: Prepare interactive 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
To meet the national standard you must:						
10. Prepare interactive slideshow and associated products for presentation						
11. Check presentation meets needs, using IT tools and making corrections as necessary						
12. Respond appropriately to quality problems to ensure that presentations meet needs and are fit for purpose						

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Unit 39: Set up an IT system 3

Unit code: S345

Unit credit: 5

Unit level: 6

Introduction

Select and connect up an IT system with a range of hardware, removable storage media and a communication service safely and successfully and is able to help others to do so. 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
For the whole unit		
A. Explain the reasons for choosing different system components and how to avoid any compatibility issues between hardware and software		
B. Explain any health and safety issues associated with setting up an IT system		
C. Explain the characteristics of IT systems that affect performance		
D. Explain the reasons for choosing a communication service		
E. Explain what effect variations in data transmission speed may have		
F. Explain the factors which influence choice of Internet Service Providers		
G. Explain what security precautions need to be addressed for the system to be used securely online by several users		
H. Explain the benefits and risks of using disk partitions or other backup locations		
I. Explain what system tests and communication tests are needed and why		
J. Explain the range of help and troubleshooting facilities available to solve problems		

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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.

Perfprmance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
1. Select and connect up the components of an IT system safely, including any peripheral devices and storage media						

Additional evidence (if applicable):

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Element 2: Select and connect IT system to a communication service successfully 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
To meet the national standard you must:						
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):

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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	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 3: Install and configure operating system and application 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. Install, set up and configure virus protection and other security systems and software						
6. Establish a backup routine for data and system						
7. Install, set up and configure application software to meet needs						

Additional evidence (if applicable):

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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
To meet the national standard you must:						
8. Select and run suitable tests to make sure that the system and communication service are working successfully						
9. Establish procedures for recovery in the event of system faults or failure						
10. Respond to faults and error messages and use help and troubleshooting facilities to determine and take appropriate action						

Additional evidence (if applicable):

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Countersigning internal verifier (if applicable): _____ Date: _____

Unit 40: Spreadsheet software 3

Unit code: S346

Unit credit: 6

Unit level: 6

Introduction

Select and use a wide range of advanced spreadsheet software tools and techniques to produce, present and check complex and non-routine spreadsheets. 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
For the whole unit		
A. Identify what numerical and other information is needed in the spreadsheet and how it should be structured		
B. Explain what methods can be used to summarise, analyse and interpret spreadsheet data and when to use them		
C. Explain how to present and format spreadsheet information effectively to meet needs		
D. Explain how to find and sort out any errors in formulas		

Additional evidence (if applicable):

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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
To meet the national standard you must:						
1. Enter and edit numerical and other data accurately						
2. Combine and link data from different sources						
3. Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available						

Additional evidence (if applicable):

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Element 2: Select and use appropriate formulas and data analysis tools and techniques 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
To meet the national standard you must:						
4. Select and use a wide range of appropriate functions and formulas to meet calculation requirements						
5. Select and use a range of tools and techniques to analyse and interpret data to meet requirements						
6. Select and use forecasting tools and techniques						

Additional evidence (if applicable):

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Element 3: Use tools and techniques to present, and format and publish 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
To meet the national standard you must:						
7. Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets effectively						
8. Select and use appropriate tools and techniques to generate, develop and format charts and graphs						
9. Select and use appropriate page layout to present, print and publish spreadsheet information						
10. Check spreadsheet information meets needs, using IT tools and making corrections as necessary						
11. Use auditing tools to identify and respond appropriately to any problems with spreadsheets						

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Unit 41: Using collaborative technologies 3

Unit code: S347

Unit credit: 6

Unit level: 6

Introduction

Manage and effectively integrate and facilitate the safe use of multiple IT tools and devices so that groups can work collaboratively and effectively by:

- setting and implementing guidelines for using collaborative technologies;
- integrating IT tools and devices and creating environments to exploit their potential;
- managing risks, permissions and data flow; and
- moderating and solving complex problems with the use of collaborative technologies.

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
For the whole unit		
A. Explain what and why guidelines need to be established for working with collaborative technology		
B. Explain how to establish an identity or present information that will promote trust		
C. Analyse and plan for the risks in the use of collaborative technologies for different tasks		
D. Explain the features, benefits and limitations of different collaborative IT tools and devices for work purposes and tasks		
E. Determine the IT tools and processes needed for archiving the outcomes of collaborative working		
F. Summarise ways to integrate different collaborative technology tools and devices for a range of purposes, tasks and communication media		
G. Explain potential access and compatibility issues with integrating different collaborative technology tools and devices		
H. Evaluate data management principles, issues and methods		
I. Determine levels of responsibility for the use of collaborative technologies		
J. Explain what problems can occur with collaborative technologies		

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Additional evidence (if applicable):

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Element 1: Stay safe and secure when 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
To meet the national standard you must:						
1. Develop and implement guidelines for good practice in working with collaborative technology						
2. Develop and implement guidelines for checking the authenticity of identities and different types of information						
3. Analyse and manage risks in the use of collaborative technologies						

Additional evidence (if applicable):

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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
To meet the national standard you must:						
4. Select, connect and configure combinations that exploit the capabilities and potential of collaborative tools and devices						
5. Resolve access and compatibility problems so that different collaborative tools and devices work successfully						

Additional evidence (if applicable):

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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:						
6. Manage levels of access and permissions for different purposes						
7. Select and integrate different elements across applications to create environments for collaborative technologies						
8. Set and adjust settings to facilitate use of collaborative technologies by others						
9. Manage data flow to benefit collaborative working						

Additional evidence (if applicable):

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Element 4: Manage 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
To meet the national standard you must:						
10. Facilitate others' responsible contributions to and engagement with collaborative technologies						
11. Manage the moderation of collaborative technologies						
12. Oversee the archiving of the outcomes of collaborative working						
13. Respond to problems with collaborative technologies and be prepared to help others to do so						

Additional evidence (if applicable):

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Unit 42: Website software 3

Unit code: S348

Unit credit: 5

Unit level: 6

Introduction

Select and use a range of advanced website software tools and techniques to develop multiple-page websites with multimedia and interactive features. 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
For the whole unit		
A. Determine what website content and layout will be needed for each page and for the site		
B. Provide guidance on laws, guidelines and constraints that affect the content and use of		
C. Websites		
D. Explain what access issues may need to be taken into account		
E. Explain when and why to use different file types for saving content		
F. Identify any quality problems with websites and explain how to respond to them		

Additional evidence (if applicable):

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Element 1: Create structures and styles and use them to produce 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
To meet the national standard you must:						
1. Plan and create web page templates to layout content						
2. Select and use website features and structures to enhance website navigation and functionality						
3. Create, select and use styles to enhance website consistency and readability						
4. Store and retrieve files effectively, in line with local guidelines and conventions where available						

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Element 2: Select and use website software tools and features to develop multiple page websites with multimedia and interactive features

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. Prepare content for web pages so that it is ready for editing and formatting						
6. Organise and combine information needed for web pages in line with any copyright constraints, including across different software						
7. Select and use appropriate editing and formatting techniques to aid meaning						
8. Select and use appropriate programming and development techniques to add features and enhance websites						
9. Select and use file formats that make information easier to download						
10. Check web pages meet 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
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Element 3: Publish and test multiple page websites with multimedia and interactive features

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:						
11. Select and use appropriate testing methods to check that all elements and features of complex websites are working as planned						
12. Select and use an appropriate programme to upload and publish the website and make sure that it will download efficiently						
13. Respond appropriately to quality problems with websites to ensure outcomes are fit for purpose						

Additional evidence (if applicable):

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Unit 43: Word processing software 3

Unit code: S349

Unit credit: 6

Unit level: 6

Introduction

Select and use a range of advanced word processing software tools and techniques to produce complex and non-routine documents. 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
For the whole unit		
A. Summarise what types of information are needed for the document and how they should be linked or integrated		
B. Explain how to combine and merge information from other software or multiple documents		
C. Analyse and explain the requirements for structure and style		
D. Explain how the information should be formatted to aid meaning		
E. Evaluate the quality of the documents produced to ensure they are fit for purpose		

Additional evidence (if applicable):

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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
To meet the national standard you must:						
1. Use appropriate techniques to enter text and other types of information accurately and efficiently						
2. Create, use and modify appropriate templates for different types of documents						
3. Combine and merge information within a document from a range of sources						
4. Store and retrieve document and associated files effectively, in line with local guidelines and conventions where available						
5. Select and use tools and techniques to work with multiple documents or users						
6. Customise interface to meet needs						

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Additional evidence (if applicable):

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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
To meet the national standard you must:						
7. Create, use and modify columns, tables and forms to organise information						
8. Define and modify styles for document elements						
9. Select and use tools and techniques to organise and structure long documents						

Additional evidence (if applicable):

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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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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 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
To meet the national standard you must:						
10. Select and use appropriate techniques to format characters and paragraphs						
11. Select and use appropriate page and section layouts to present and print multipage and multi-section documents						
12. Check documents meet needs, using IT tools and making corrections as necessary						
13. Respond appropriately to any quality problems with documents to ensure that outcomes meet needs and are fit for purpose						

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: _____

Unit 44: Using email 3

Unit code: S350

Unit credit: 3

Unit level: 6

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
For the whole unit		
A. Explain methods to improve message transmission		
B. Explain why and how to stay safe and respect others when using email		
C. Explain why, how and when to archive messages		
D. Explain how to minimise e-mail problems		

Additional evidence (if applicable):

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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: _____

Countersigning internal verifier (if applicable): _____ Date: _____

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
To meet the national standard you must:						
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 manage contact information						

Additional evidence (if applicable):

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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 2: Manage use of e-mail software 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. Develop and communicate guidelines and procedures for using e-mail effectively						
5. Read and respond appropriately to e-mail messages and attachments						
6. Use email software tools and techniques to automate responses						
7. Organise, store and archive e-mail messages effectively						
8. Customise e-mail software to make it easier to use						
9. Respond appropriately to email problems						

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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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Countersigning internal verifier (if applicable): _____ Date: _____

Unit 45: Produce documents in a business environment

Unit code: S211

Unit credit: 4

Unit level: 5

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
For the whole unit		
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		

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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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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
To meet the national standard you must:						
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):

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 assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Unit 46: Prepare text from notes

Unit code: S212

Unit credit: 4

Unit level: 6

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
For the whole unit		
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		

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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

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 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):

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: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Unit 47: Prepare text from notes using touch typing (40 wpm)

Unit code: S213

Unit credit: 3

Unit level: 5

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
For the whole unit		
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		

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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: 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
To meet the national standard you must:						
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):

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: _____

Unit 48: Prepare text from shorthand (60 wpm)

Unit code: S214

Unit credit: 8

Unit level: 5

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
For the whole unit		
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):

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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: _____

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
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 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						

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Additional evidence (if applicable):

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Unit 49: Prepare text from recorded audio instruction (40 wpm)

Unit code: S215

Unit credit: 4

Unit level: 5

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
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 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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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 assessor signature (if applicable): _____ Date: _____

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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
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 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						

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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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Countersigning assessor signature (if applicable): _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Unit 50: Support the organisation and co-ordination of events

Unit code: S222

Unit credit: 5

Unit level: 5

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
For the whole unit		
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		

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Additional evidence (if applicable):

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	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: _____

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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
To meet the national standard you must:						
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):

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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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 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:						
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):

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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
	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: _____

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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 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:						
16. Clear and vacate the venue, in accordance with terms of the contract						
17. Conduct follow-up activities, as required						

Additional evidence (if applicable):

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Unit 51: Support the organisation of business travel or accommodation

Unit code: S223

Unit credit: 3

Unit level: 5

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

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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
For the whole unit		
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		

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Additional evidence (if applicable):

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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
To meet the national standard you must:						
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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	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: _____

Unit 52: Support the organisation of meetings

Unit code: S224

Unit credit: 4

Unit level: 5

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
For the whole unit		
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		

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Additional evidence (if applicable):

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Countersigning internal verifier (if applicable): _____ Date: _____

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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
To meet the national standard you must:						
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):

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
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Countersigning assessor signature (if applicable): _____ Date: _____

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Countersigning internal verifier (if applicable): _____ Date: _____

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
To meet the national standard you must:						
8. Attend to any requirements during the meeting as directed by the meeting organiser						

Additional evidence (if applicable):

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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
To meet the national standard you must:						
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):

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	P = products of the learner's work	WT = authentic statements/witness testimony
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Unit 53: Handle Mail

Unit code: S209

Unit credit: 3

Unit level: 5

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
For the whole unit		
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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Element 1: Incoming Mail

What you must do

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

Peformance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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						

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Additional evidence (if applicable):

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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
To meet the national standard you must:						
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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Unit 54: Provide reception services

Unit code: S210

Unit credit: 3

Unit level: 5

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

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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
For the whole unit		
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):

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Provide reception 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:						
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						

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Unit 55: Meet and Welcome Visitors

Unit code: S250

Unit credit: 3

Unit level: 5

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
For the whole unit		
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		

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Additional evidence (if applicable):

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Assessor signature: _____ Date: _____

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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Meet and welcome visitors

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. 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):

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Unit 56: Use Electronic Message Systems

Unit code: S206

Unit credit: 1

Unit level: 5

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
For the whole unit		
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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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
To meet the national standard you must:						
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						

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Unit 57: Use a Diary System

Unit code: S207

Unit credit: 3

Unit level: 5

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
For the whole unit		
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		

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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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Use a diary 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
To meet the national standard you must:						
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):

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Unit 58: Take Minutes

Unit code: S208

Unit credit: 4

Unit level: 5

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
For the whole unit		
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		

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Additional evidence (if applicable):

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Take minutes

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. 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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Unit 59: Organise and report data

Unit code: S216

Unit credit: 3

Unit level: 5

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
For the whole unit		
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):

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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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Countersigning internal verifier (if applicable): _____ Date: _____

Organise and report 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
To meet the national standard you must:						
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						

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Unit 60: Research Information

Unit code: S217

Unit credit: 4

Unit level: 5

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
For the whole unit		
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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	Q&A = outcomes from oral or written questioning	A = assignment, project/case studies
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Element 1: Research 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:						
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						

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Unit 61: Store and retrieve information

Unit code: S218

Unit credit: 3

Unit level: 5

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
For the whole unit		
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		

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Additional evidence (if applicable):

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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
To meet the national standard you must:						
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						

Additional evidence (if applicable):

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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):

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Unit 62: Provide Archive Services

Unit code: S219

Unit credit: 2

Unit level: 5

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
For the whole unit		
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		

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Provide archive services

What you must do

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

Performances	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
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):

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Unit 63: Support the management and development of an information system

Unit code: S226

Unit credit: 7

Unit level: 7

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
For the whole unit		
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		

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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
To meet the national standard you must:						
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):

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Countersigning internal verifier (if applicable): _____ Date: _____

Unit 64: Design and develop information systems

Unit code: S413

Unit credit: 7

Unit level: 8

Introduction

Design, develop and test information systems to meet organisational and 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
For the whole unit		
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		

Additional evidence (if applicable):

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Design and develop 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
To meet the national standard you must:						
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. Design a system specification that meets identified needs and budgetary controls						
4. Develop an information system that meets the specification						
5. Test the information system against the agreed specification						

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Unit 65: Manage and evaluate information systems

Unit code: S414

Unit credit: 6

Unit level: 8

Introduction

Monitor and evaluate information systems 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
For the whole unit		
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		

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Additional evidence (if applicable):

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Countersigning internal verifier (if applicable): _____ Date: _____

Manage and evaluate 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
To meet the national standard you must:						
1. Provide training and ongoing support to users						
2. Make sure management structures are in place to identify, analyse and resolve problems with the information system						
3. Monitor use of, accuracy and productivity of the information system to meet organisational requirements						
4. Make sure the information system is maintained and updated to meet users' needs						
5. Make sure that all requirements for relevant legislation are followed						
6. Collect feedback on performance of information systems						
7. Evaluate feedback and prioritise development needs						
8. Update information to enable further system development						

Additional evidence (if applicable):

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Unit 66: Use Office Equipment

Unit code: S220

Unit credit: 3

Unit level: 5

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
For the whole unit		
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 agreed requirements		

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Use office equipment

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. 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 67: Maintain and issue stationery stock items

Unit code: S221

Unit credit: 3

Unit level: 5

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
For the whole unit		
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 stationery stock items and how to deal with these correctly		
C. Methods of keeping up-to-date, accurate and legible records of stationery stock items		
D. The current level of demand for stationery stock items and factors which may affect future levels of demand		
E. How to handle and store stationery stock items safely and securely		
F. The different suppliers to order from		
G. Any differences in the way stationery stock items are ordered from internal and external suppliers		
H. Organisational procedures for issuing stationery stock items		
I. The circumstances in which receipts may be required for stationery stock items issued		
J. How to recommend improvements to systems		

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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
To meet the national standard you must:						
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):

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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
To meet the national standard you must:						
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						

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Unit 68: Manage Budgets

Unit code: S416

Unit credit: 5

Unit level: 7

Introduction

Control, monitor and record transactions for an agreed budget.

Specific skills:

- Analysing
- Prioritising
- Monitoring
- Problem-solving
- Negotiating
- 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
For the whole unit		
A. The purpose and benefits of managing financial resources		
B. The legal, regulatory and organisational requirements for managing a budget		
C. The scope of own authority for managing a budget and authorising expenditure		
D. How to monitor, control and record income and expenditure		
E. Ways to minimise costs and make sure of best value for money		
F. The action to take if there is an overspend		
G. The purpose and benefits of reporting information on performance against budget when required		
H. How to check the accuracy of budget calculations		
I. The purpose and benefits of recording information to help with the preparation of future budgets		

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Manage budgets

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. Authorise expenditure within the scope of own authority						
2. Control budget performance within limits and deadlines						
3. Monitor the budget and take action to minimise costs, and make sure of best value for money, where possible						
4. Take appropriate action in event of overspend						
5. Record transactions in line with organisational procedures and legal requirements						
6. Produce information on performance against budget, when required						
7. Make sure all calculations are accurate						
8. Record information to help with the preparation of future budgets						

Additional evidence (if applicable):

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Unit 69: Respond to change in a business environment

Unit code: S225

Unit credit: 3

Unit level: 5

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
For the whole unit		
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		

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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
To meet the national standard you must:						
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						

Additional evidence (if applicable):

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Unit 70: Implement and evaluate innovation in a business environment

Unit code: S419

Unit credit: 6

Unit level: 8

Introduction

Implement and evaluate innovation when working in a business environment.

Specific skills:

- Analysing
- Organising
- Questioning
- Communicating
- Persuading
- Evaluating
- Planning
- Negotiating
- 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
For the whole unit		
A. The value of innovation in staying competitive and offering new solutions to established problems		
B. How to review the status quo in a way that is likely to achieve the results you want		
C. How to research possible improvements		
D. How to evaluate ideas, including cost/benefit and impact analysis		
E. How to question assumptions to develop concepts and propositions		
F. How to communicate and sell ideas to other people		
G. How to show that ideas contributed by others are valued		
H. How to decide when an idea is, or is not, viable		
I. How to decide which decision-makers to approach and influence		
J. How to develop and document proposals		
K. Risk analysis and risk management during periods of change		
L. The value of reflecting on and learning from mistakes		

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Implement and evaluate innovation 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
To meet the national standard you must:						
1. Constructively question existing ways of working within the organisation						
2. Research and identify possible innovations to working methods, services or products						
3. Gather information to develop own ideas						
4. Evaluate ideas based on agreed criteria, including complying with organisational aims and objectives						
5. Identify the costs and benefits of own ideas, including the resources needed and the likely impact on others						
6. Evaluate the potential of own ideas with colleagues, including whether they have been tried before and what would be different this time						
7. Ask appropriate questions to extend own thinking and question own assumptions						
8. Communicate and sell ideas to others						
9. Take feedback into account and show a willingness to adapt						
10. Decide whether or not own ideas are viable						
11. Put forward a formal proposal to persuade decision-makers						

Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:						
12. Recognise when it is appropriate to take acceptable risks						
13. Show a willingness to learn from mistakes						

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Unit 71: Plan change for a team

Unit code: S420

Unit credit: 6

Unit level: 8

Introduction

Identify and develop opportunities for change and plan change for a team.

Specific skills:

- Analysing
- Communicating
- Decision-making
- Evaluating
- Managing resources
- Motivating
- Negotiating
- Organising
- Persuading
- 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
For the whole unit		
A. The purpose and benefits of change to organisations, individuals and teams		
B. The purpose and benefits of engaging teams and individuals in the whole change process and encouraging them to feel they are contributing to the process		
C. How teams and individuals can challenge creatively and constructively existing ways of working		
D. The purpose of having a vision and goals for change and to communicate them to those involved		
E. The purpose and benefits of planning the promotion of change		
F. The purpose and benefits of being adaptable during the change process and being ready to renegotiate plans		
G. The types of problems that may arise during a change process and how to respond to them		

Additional evidence (if applicable):

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Element 1: Identify and develop opportunities for change

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. Recognise opportunities for change for the team						
2. Evaluate options for change in terms of the constraints, risks, benefits, costs, resources and implications for the organisation and team						
3. Analyse and cost the risks and benefits associated with these options						
4. Persuade team to commit itself to change						

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Element 2: Plan for change

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. Encourage the team to challenge existing ways of working and to put forward new ideas						
6. Plan change, identifying vision, goals, objectives, timescales and resources						
7. Agree plans for change with relevant decision-makers						

Additional evidence (if applicable):

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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 72: Administer HR records

Unit code: S227

Unit credit: 3

Unit level: 5

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
Element 1: Create personnel files for new starters		
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		
Element 2 : Maintain Human Resource information		
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		
Element 3: Report Human Resource information		
E The types of reports that may be requested		
F How to produce reports from individual or multiple Human Resource files		

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Knowledge	Type of evidence	Date
Element 4: Comply with organisational and legal requirements		
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):

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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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
To meet the national standard you must:						
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):

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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
To meet the national standard you must:						
6. Keep required personnel information up-to-date						
7. Maintain records of: • performance management and development • holiday, sickness and other leave • disciplinary and grievance • exit process						
8. Process and file relevant correspondence and documentation Report Human Resource information						

Additional evidence (if applicable):

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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	Type of evidence	Portfolio Reference	Date
To meet the national standard you must:									
9. Provide as requested • information from individual personnel files • management information reports									

Additional evidence (if applicable):

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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
To meet the national standard you must:						
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):

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Unit 73: Administer the recruitment and selection process

Unit code: S228

Unit credit: 4

Unit level: 5

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
Element 1: Advertise job vacancies		
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		
Element 2 : Respond to potential applicants		
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		

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Knowledge	Type of evidence	Date
Element 3: Administer the selection process		
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		
Element 4: Administer the appointment process		
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):

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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
To meet the national standard you must:						
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						

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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
To meet the national standard you must:						
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):

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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
To meet the national standard you must:						
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):

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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
To meet the national standard you must:						
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):

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Unit 74: Administer parking dispensations

Unit code: S251

Unit credit: 4

Unit level: 5

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
For the whole unit		
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		

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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
To meet the national standard you must:						
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):

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
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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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Unit 75: Use occupational and safety guidelines when using keyboards

Unit code: S112

Unit credit: 2

Unit level: 4

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
For the whole unit		
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):

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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
To meet the national standard you must:						
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						

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Additional evidence (if applicable):

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Unit 76: Bespoke Software 2

Unit code: S236a

Unit credit: 3

Unit level: 5

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
For the whole unit		
A. Describe what functions to apply to structure and layout information effectively		

Additional evidence (if applicable):

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Element 1: Input and combine information using bespoke or 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
To meet the national standard you must:						
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):

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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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	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: 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
To meet the national standard you must:						
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):

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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
To meet the national standard you must:						
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):

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Countersigning internal verifier (if applicable): _____ Date: _____

Unit 77: Specialist Software 2

Unit code: S236b

Unit credit: 3

Unit level: 5

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
For the whole unit		
A. Describe what functions to apply to structure and layout information effectively		

Additional evidence (if applicable):

Column key:	**O = direct observation of the learner's performance by their assessor**	**PD = professional discussion**
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Internal verifier signature: _____ Date: _____

Countersigning internal verifier (if applicable): _____ Date: _____

Element 1: Input and combine information using bespoke or 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
To meet the national standard you must:						
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):

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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
To meet the national standard you must:						
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):

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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
To meet the national standard you must:						
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):

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	P = products of the learner's work	WT = authentic statements/witness testimony
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Countersigning internal verifier (if applicable): _____ Date: _____

Unit 78: Data management software 2

Unit code: S237

Unit credit: 3

Unit level: 5

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
For the whole unit		
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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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
To meet the national standard you must:						
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						

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Additional evidence (if applicable):

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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
To meet the national standard you must:						
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):

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Unit 79: Database Software 2

Unit code: S238

Unit credit: 4

Unit level: 5

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
For the whole unit		
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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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
To meet the national standard you must:						
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):

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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
To meet the national standard you must:						
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):

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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
To meet the national standard you must:						
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):

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Unit 80: Improving productivity using IT 2

Unit code: S239

Unit credit: 4

Unit level: 5

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
For the whole unit		
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		

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Additional evidence (if applicable):

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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
To meet the national standard you must:						
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):

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
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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):

Column key:	O = direct observation of the learner's performance by their assessor	PD = professional discussion
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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
To meet the national standard you must:						
5. Develop solutions to improve own productivity in using IT						
6. Test solutions to ensure that they work as intended						

Additional evidence (if applicable):

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Unit 81: IT security for users 2

Unit code: S240

Unit credit: 2

Unit level: 5

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

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. Describe the security issues that may threaten system performance		
B. Describe the threats to system and information security and integrity		
C. Describe ways to protect hardware, software and data and minimise security risk		
D. Describe why it is important to backup data and how to do so securely		

Additional evidence (if applicable):

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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
To meet the national standard you must:						
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						

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Additional evidence (if applicable):

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Unit 82: Presentation Software 2

Unit code: S241

Unit credit: 4

Unit level: 5

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
For the whole unit		
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):

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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
To meet the national standard you must:						
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						

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Additional evidence (if applicable):

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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
To meet the national standard you must:						
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):

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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
To meet the national standard you must:						
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):

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Unit 83: Setting up an IT system 2

Unit code: S242

Unit credit: 4

Unit level: 5

Introduction

Select and connect up an IT system with a range of hardware, removable storage media and a communication service safely and run more advanced tests to check it is working successfully. 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
For the whole unit		
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):

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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
To meet the national standard you must:						
1. Select and connect up the components of an IT system safely, including any peripheral devices and storage media						

Additional evidence (if applicable):

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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
To meet the national standard you must:						
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):

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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						

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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
To meet the national standard you must:						
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):

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Unit 84: Spreadsheet Software 2

Unit code: S243

Unit credit: 4

Unit level: 5

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

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 Identify what numerical and other information is needed in the spreadsheet and how it should be structured		
B Identify which tools and techniques to use to analyse and manipulate data to meet requirements		
C Plan how to present and format spreadsheet information effectively to meet needs		
D Describe how to find errors in spreadsheet formulas		

Additional evidence (if applicable):

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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
To meet the national standard you must:						
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):

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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
To meet the national standard you must:						
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):

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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
To meet the national standard you must:						
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						

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Unit 85: Using collaborative technologies 2

Unit code: S244

Unit credit: 4

Unit level: 5

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
For the whole unit		
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		

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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
To meet the national standard you must:						
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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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
To meet the national standard you must:						
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):

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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:						
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):

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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
To meet the national standard you must:						
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						

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Additional evidence (if applicable):

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Unit 86: Website Software 2

Unit code: S245

Unit credit: 4

Unit level: 5

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
For the whole unit		
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):

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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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Countersigning assessor signature (if applicable): _____ Date: _____

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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
To meet the national standard you must:						
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
To meet the national standard you must:						
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						

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Additional evidence (if applicable):

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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
To meet the national standard you must:						
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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Unit 87: Word Processing Software 2

Unit code: S246

Unit credit: 4

Unit level: 5

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

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. Identify what types of information are needed in documents		
B. Identify when and how to combine and merge information from other software or other documents		
C. Identify the document requirements for structure and style		
D. Identify what templates and styles are available and when to use them		
E. Identify how the document should be formatted to aid meaning		
F. Describe any quality problems with documents		

Additional evidence (if applicable):

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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
To meet the national standard you must:						
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						

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Additional evidence (if applicable):

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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
To meet the national standard you must:						
6. Create, use and modify columns, tables and forms to organise information						
7. Select and apply styles to text						

Additional evidence (if applicable):

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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
To meet the national standard you must:						
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						

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Unit 88: Using Email 2

Unit code: S252

Unit credit: 3

Unit level: 5

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
For the whole unit		
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):

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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
To meet the national standard you must:						
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):

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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):

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Unit 89: Calculate Pay

Unit code: S125

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

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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
Element 1: Types of Payroll		
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)		
Element 2: The Statutory Framework		
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		
Element 3: The Organisation		
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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Calculate pay

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. 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;						

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Performance	Type of evidence	Portfolio Reference	Date	Type of evidence	Portfolio Reference			Date	
To meet the national standard you must:									
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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Unit 90: Control Payroll

Unit code: S247

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
Element 1: The Statutory Framework		
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.		
Element 2: The Organisation		
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.		

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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
To meet the national standard you must:						
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 nonstatutory 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
To meet the national standard you must:						
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						

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Unit 91: Account for income and expenditure

Unit code: S248

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

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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
Element 1: The Business Environment		
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		
Element 2: Accounting Techniques, Principles and Theory		
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.		

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Knowledge	Type of evidence	Date
Element 3: The Organisation		
Q. The organisation's accounting, administrative and filing systems and procedures;		
R. The nature of the organisation's business transactions;		

Additional evidence (if applicable):

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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
To meet the national standard you must:						
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
To meet the national standard you must:						
11. Identify reasons for imbalance, rectify them and make accurate corrections in the journal						

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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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 92: Draft financial statements

Unit code: S249

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
Element 1: The Business Environment		
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		
Element 2: Accounting Techniques, Principles and Theory		
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		

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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
	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: _____

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: _____

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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
To meet the national standard you must:						
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):

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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