

Specification

BTEC Specialist qualification

Edexcel BTEC Level 3 Diploma for Medical Secretaries (QCF)

For first teaching November 2011

Edexcel, a Pearson company, is the UK's largest awarding body offering academic and vocational qualifications and testing to schools, colleges, employers and other places of learning in the UK and internationally. Qualifications include GCSE, AS and A Level, NVQ and our BTEC suite of vocational qualifications from entry level to BTEC Higher National Diplomas. Edexcel and BTEC qualifications are administered by Pearson Education Ltd.

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All information in this specification is correct at time of going to publication.

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BTEC Specialist qualification title covered by this specification

Edexcel BTEC Level 3 Diploma for Medical Secretaries (QCF)

This qualification has been accredited to the Qualifications and Credit Framework (QCF) and is eligible for public funding as determined by the Department for Education (DfE) under Section 96 of the Learning and Skills Act 2000.

The qualification title listed above features in the funding lists published annually by the DfE and the regularly updated website www.education.gov.uk/. The QCF Qualification Number (QN) should be used by centres when they wish to seek public funding for their learners. Each unit within a qualification will also have a QCF unit code.

The QCF qualification and unit codes will appear on learners' final certification documentation.

The Qualification Accreditation Number for the qualification in this publication is:

Edexcel BTEC Level 3 Diploma for Medical Secretaries (QCF) 600/3474/9

This qualification title will appear on learners' certificates. Learners need to be made aware of this when they are recruited by the centre and registered with Edexcel.

Welcome to the Edexcel BTEC Level 3 Diploma for Medical Secretaries

We are delighted to introduce our new qualification, which will be available for teaching from November 2011. This qualification conforms with the requirements of the QCF (Qualifications and Credit Framework).

Focusing on the Edexcel BTEC Level 3 Diploma for Medical Secretaries

This specialist qualification is a component of the Business Administration Apprenticeship framework at Level 3, for the Medical Administration pathway.

The broad purpose of the qualification and its primary focus is to provide the necessary knowledge and understanding of the specialist administrative and secretarial requirements for working in the medical sector.

Straightforward to implement, teach and assess

Implementing BTECs couldn't be easier. They are designed to easily fit into your curriculum and can be studied independently or alongside existing qualifications, to suit the interests and aspirations of learners. The clarity of assessment makes grading learner attainment simpler.

Engaging for everyone

Learners of all abilities flourish when they can apply their own knowledge, skills and enthusiasm to a subject. BTEC qualifications make explicit the link between theoretical learning and the world of work by giving learners the opportunity to apply their research, skills and knowledge to work-related contexts and case studies. These applied and practical BTEC approaches give all learners the impetus they need to achieve and the skills they require for workplace or education progression.

Recognition

BTECs are understood and recognised by a large number of organisations in a wide range of sectors. BTEC qualifications are developed with key industry representatives and Sector Skills Councils (SSC) to ensure that they meet employer and learner needs — **in this case the Council for Administration (CfA) SSC**. Many industry and professional bodies offer successful BTEC learners exemptions for their own accredited qualifications.

All you need to get started

To help you off to a flying start, we've developed an enhanced specification that gives you all the information you need to start teaching BTEC. This includes:

- a framework of equivalencies, so you can see how this qualification compares with other Edexcel vocational qualifications
- information on rules of combination, structures and quality assurance, so you can deliver the qualification with confidence

Don't forget that we're always here to offer curriculum and qualification updates, local training and network opportunities, advice, guidance and support.

Contents

What are BTEC Level 3 Specialist qualifications?	1
Edexcel BTEC Level 3 Diploma	2
Key features of the Edexcel BTEC Level 3 Diploma for Medical Secretaries (QCF)	2
National Occupational Standards	2
Rules of combination	3
Edexcel BTEC Level 3 Diploma for Medical Secretaries (QCF)	4
Assessment	5
Quality assurance of centres	6
Approval	7
Quality Assurance Guidance	7
Programme design and delivery	7
Mode of delivery	7
Resources	8
Delivery approach	8
Additional and specialist learning	8
Access and recruitment	8
Restrictions on learner entry	9
Access arrangements and special considerations	9
Recognition of Prior Learning	9
Unit format	11
Unit title	11
Unit code	11
QCF level	11
Credit value	11
Guided learning hours	11

Unit aim	11
Learning outcomes	12
Assessment criteria	12
Units	15
Unit 1: Medical Principles for the Administrator	17
Unit 2: Medical Administration	19
Unit 3: Managing Communication in a Medical Environment	23
Unit 4: Medical Word Processing and Audio Transcription	25
Unit 5: Medical Terminology	27
Unit 6: Medical Terminology	35
Unit 7: Work Experience in a Medical Environment	37
Unit 8: Legal Aspects of Medical Administration	41
Unit 9: Spreadsheet Software	43
Unit 10: Database Software	47
Unit 11: Presentation Software	49
Unit 12: Spreadsheet Software	53
Unit 13: Presentation Software	57
Further information	61
Useful publications	61
How to obtain National Occupational Standards	61
Professional development and training	62
Annexe A	63
The Edexcel/BTEC qualification framework for the Business and Administration and Management and Team Leading sector	63

What are BTEC Level 3 Specialist qualifications?

BTEC Specialist qualifications are qualifications at Entry Level to Level 3 in the Qualifications and Credit Framework (QCF) and are designed to provide specialist work-related qualifications in a range of sectors. They give learners the knowledge, understanding and skills that they need to prepare for employment. The qualifications also provide career development opportunities for those already in work. Consequently they provide a course of study for full-time or part-time learners in schools, colleges and training centres.

BTEC Specialist qualifications provide much of the underpinning knowledge and understanding for the National Occupational Standards for the sector, where these are appropriate. They are supported by the relevant Standards Setting Body (SSB) or Sector Skills Council (SSC). A number of BTEC Specialist qualifications are recognised as the knowledge components of Apprenticeships Frameworks.

On successful completion of a BTEC Specialist qualification, learners can progress to or within employment and/or continue their study in the same, or related vocational area.

The QCF is a framework which awards credit for qualifications and units and aims to present qualifications in a way that is easy to understand and measure. It enables learners to gain qualifications at their own pace along flexible routes.

There are three sizes of qualification in the QCF:

- Award (1 to 12 credits)
- Certificate (13 to 36 credits)
- Diploma (37 credits and above).

Every unit and qualification in the framework will have a credit value.

The credit value of a unit specifies the number of credits that will be awarded to a learner who has achieved the learning outcomes of the unit.

The credit value of a unit is based on:

- one credit for those learning outcomes achievable in 10 hours of learning
- learning time – defined as the time taken by learners at the level of the unit, on average, to complete the learning outcomes of the unit to the standard determined by the assessment criteria.

The credit value of the unit will remain constant in all contexts, regardless of the assessment method used for the qualification(s) to which it contributes.

Learning time should address all learning (including assessment) relevant to the learning outcomes, regardless of where, when and how the learning has taken place.

Edexcel BTEC Level 3 Diploma

The Edexcel BTEC Level 3 Diploma for Medical Secretaries (QCF) extends the work-related focus from the Edexcel BTEC Level 2 Diploma in Medical Administration.

There is potential for the qualification to prepare learners for employment in medical administration and it is suitable for those who have decided that they wish to enter a specific area of work.

Key features of the Edexcel BTEC Level 3 Diploma for Medical Secretaries (QCF)

The Edexcel BTEC Level 3 Diploma for Medical Secretaries (QCF) has been developed to give learners the opportunity to:

- engage in learning that is relevant to them and which will provide opportunities to develop a range of skills and techniques, personal skills and attributes essential for successful performance in working life
- achieve a nationally recognised Level 3 vocationally-related qualification
- progress to employment in medical administration
- progress to related general and/or vocational qualifications.

National Occupational Standards

Where relevant, Edexcel BTEC qualifications are designed to provide some of the underpinning knowledge and understanding for the National Occupational Standards (NOS), as well as developing practical skills in preparation for work and possible achievement of NVQs in due course. NOS form the basis of National Vocational Qualifications (NVQs). Edexcel BTEC (QCF) qualifications do not purport to deliver occupational competence in the sector, which should be demonstrated in a work context.

The Edexcel BTEC Level 3 Diploma for Medical Secretaries (QCF) relates to the following NOS:

- Business Administration
- IT Users.

Rules of combination

The rules of combination specify the credits that need to be achieved, through the completion of particular units, for the qualification to be awarded. All accredited qualifications within the QCF have rules of combination.

When combining units for an Edexcel BTEC Level 3 Diploma for Medical Secretaries (QCF), it is the centre's responsibility to ensure that the following rules of combination are adhered to.

Edexcel BTEC Level 3 Diploma for Medical Secretaries (QCF)

- 1 Qualification credit value: a minimum of 49 credits
- 2 Minimum credit to be achieved at, or above, the level of the qualification: 30 credits.
- 3 All credits must be achieved from the units listed in this specification.

Edexcel BTEC Level 3 Diploma for Medical Secretaries (QCF)

The Edexcel BTEC Level 3 Diploma for Medical Secretaries (QCF) consists of 4 mandatory units **plus** optional units that provide for a combined minimum total of 49 credits.

Learners must complete 4 mandatory units (39 credits) and the remaining credits (minimum of 10) from the optional units, which must include Unit 5 or Unit 6.

If learners achieve the Level 2 Medical Terminology unit (Unit 6), they must achieve the remaining credit from Units 7-13.

Unit No	Unit Ref	Unit Title	Credit	Level
Mandatory Units – 39 credits				
1	J/600/2488	Medical Principles for the Administrator	9	2
2	K/600/2502	Medical Administration	9	3
3	T/600/2504	Managing Communication in a Medical Environment	8	3
4	F/600/2506	Medical Word Processing and Audio Transcription	13	3
Optional Units – 10 credits				
5	L/501/7452	Medical Terminology	14	3
OR				
6	T/501/7414	Medical Terminology	6	2
Plus remaining credit from any of these additional optional units:				
7	D/600/2500	Work Experience in a Medical Environment	5	2
8	J/600/2507	Legal Aspects of Medical Administration	7	3
9	F/502/4625	Spreadsheet Software	4	2
10	M/502/4555	Database Software	4	2
11	M/502/4622	Presentation Software	4	2
12	J/502/4626	Spreadsheet Software	6	3
13	T/502/4623	Presentation Software	6	3

Assessment

All units within this qualification are internally assessed. The qualifications are criterion referenced, based on the achievement of all the specified learning outcomes.

To achieve a 'pass' a learner must have successfully passed **all** the assessment criteria.

Guidance

The purpose of assessment is to ensure that effective learning has taken place to give learners the opportunity to:

- meet the standard determined by the assessment criteria and
- achieve the learning outcomes.

All the assignments created by centres should be reliable and fit for purpose, and should be built on the unit assessment criteria. Assessment tasks and activities should enable learners to produce valid, sufficient and reliable evidence that relates directly to the specified criteria. Centres should enable learners to produce evidence in a variety of different forms, including performance observation, presentations and posters, along with projects, or time-constrained assessments.

Centres are encouraged to emphasise the practical application of the assessment criteria, providing a realistic scenario for learners to adopt, and making maximum use of practical activities. The creation of assignments that are fit for purpose is vital to achievement and their importance cannot be over-emphasised.

The assessment criteria must be clearly indicated in the assignments briefs. This gives learners focus and helps with internal verification and standardisation processes. It will also help to ensure that learner feedback is specific to the assessment criteria.

When designing assignments briefs, centres are encouraged to identify common topics and themes. A central feature of vocational assessment is that it allows for assessment to be:

- current, ie to reflect the most recent developments and issues
- local, ie to reflect the employment context of the delivering centre
- flexible to reflect learner needs, ie at a time and in a way that matches the learner's requirements so that they can demonstrate achievement.

Qualification grade

Learners who achieve the minimum eligible credit value specified by the rule of combination will achieve the qualification at pass grade.

Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. The centre assesses BTEC qualifications. The centre will use quality assurance to make sure that their managers, internal verifiers and assessors are standardised and supported. Edexcel use quality assurance to check that all centres are working to national standards. It gives us the opportunity to identify and provide support, if needed, to safeguard certification. It also allows us to recognise and support good practice.

For the qualifications in this specification, the Edexcel quality assurance model will follow one of the processes listed below.

- 1 Delivery of the qualification as part of a BTEC apprenticeship (single click registration)
 - an annual visit by a Standards Verifier to review centre-wide quality assurance systems and sampling of internal verification and assessor decisions
- 2 Delivery of the qualification outside the apprenticeship
 - an annual visit to the centre by a Centre Quality Reviewer to review centre-wide quality assurance systems
 - Lead Internal Verifier accreditation. This involves online training and standardisation of Lead Internal Verifiers using our OSCA platform, accessed via Edexcel Online. Please note that not all qualifications will include Lead Internal Verifier accreditation. Where this is the case, we will annually allocate a Standards Verifier to conduct postal sampling of internal verification and assessor decisions for the Principal Subject Area.

For further details, go to the UK BTEC Quality Assurance Handbook on our website www.edexcel.com.

Approval

Centres are required to declare their commitment to ensuring the quality of the programme of learning and providing appropriate assessment opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

Centres already holding BTEC approval are able to gain qualification approval online. New centres must complete a centre approval application.

Quality Assurance Guidance

Details of quality assurance for the Edexcel BTEC Level 2-3 qualifications are set out in centre guidance which is published on our website (www.edexcel.com).

Programme design and delivery

Mode of delivery

Edexcel does not normally define the mode of delivery for Edexcel BTEC qualifications. Centres are free to offer the qualifications using any mode of delivery (such as full-time, part-time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must ensure that learners have appropriate access to the resources identified in the specification and to the subject specialists delivering the units. This is particularly important for learners studying for the qualification through open or distance learning.

Learners studying for the qualification on a part-time basis bring with them a wealth of experience that should be utilised to maximum effect by tutors and assessors. The use of assessment evidence drawn from learners' work environments should be encouraged. Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to ensure a course relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment
- linking with company-based/workplace training programmes
- making full use of the variety of experience of work and life that learners bring to the programme.

Resources

Edexcel BTEC Level 3 qualifications are designed to give learners an understanding of the skills needed for specific vocational sectors. Physical resources need to support the delivery of the programme and the assessment of the learning outcomes, and should therefore normally be of industry standard. Staff delivering programmes and conducting the assessments should be familiar with current practice and standards in the sector concerned. Centres will need to meet any specific resource requirements to gain approval from Edexcel.

Where specific resources are required these have been indicated in individual units in the *Essential resources* sections.

Delivery approach

It is important that centres develop an approach to teaching and learning that supports the vocational nature of Edexcel BTEC Level 3 qualifications and the mode of delivery. Specifications give a balance of practical skill development and knowledge requirements, some of which can be theoretical in nature. Tutors and assessors need to ensure that appropriate links are made between theory and practical application and that the knowledge base is applied to the sector. This requires the development of relevant and up-to-date teaching materials that allow learners to apply their learning to actual events and activity within the sector. Maximum use should be made of learners' experience.

Additional and specialist learning

Additional and Specialist Learning (ASL) consists of accredited qualifications at the same level as, or one level above a 14-19 Diploma course of study, which have been approved under Section 96 of the Learning and Skills Act 2000. The ASL may include BTEC qualifications which are also available to learners not following a 14-19 Diploma course of study.

ASL qualifications are listed on the 14-19 Diploma Catalogue which is available on the Register of Regulated Qualifications (www.ofqual.gov.uk). The catalogue will expand over time as more qualifications are accredited and approved.

Centres undertaking, or preparing to undertake, ASL should refer regularly to the Edexcel website for information regarding additions and the 14-19 Diploma Catalogue for the latest information.

Access and recruitment

Edexcel's policy regarding access to its qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all wishing to access the qualifications.

Centres are required to recruit learners to BTEC qualifications with integrity. This will include ensuring that applicants have appropriate information and advice about the qualifications and that the qualification will meet their needs. Centres should take appropriate steps to assess each applicant's potential and make a professional judgement about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Edexcel's policy on learners with particular requirements.

Centres will need to review the entry profile of qualifications and/or experience held by applicants, considering whether this profile shows an ability to progress to a higher level qualification.

Restrictions on learner entry

The Edexcel BTEC Level 3 Diploma for Medical Secretaries (QCF) is accredited on the QCF for learners aged 16 and above.

Access arrangements and special considerations

Equality and fairness are central to our work. Edexcel's Equality Policy requires that all learners should have equal opportunity to access our qualifications and assessments and that our qualifications should be awarded in a way that is fair to every learner.

We are committed to ensuring that:

- learners with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to learners who do not share that characteristic
- all learners achieve the recognition they deserve from undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

Details on how to make adjustments for learners with protected characteristics are given in the policy document *Reasonable Adjustment and Special Considerations for BTEC and Edexcel NVQ Qualifications*, which can be found on the Edexcel website, www.edexcel.com/Policies

Recognition of Prior Learning

Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

Edexcel encourages centres to recognise learners' previous achievements and experiences whether at work, home and at leisure, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning.

RPL enables recognition of achievement from a range of activities using any valid assessment methodology. Provided that the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be sufficient, reliable and valid.

Unit format

All units in the Edexcel BTEC Level 3 Specialist qualifications have a standard format. The unit format is designed to give guidance on the requirements of the qualification for learners, tutors, assessors and those responsible for monitoring national standards.

Each unit has the following sections.

Unit title

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

Unit code

Each unit is assigned a QCF unit code that appears with the unit title on the National Database of Accredited Qualifications.

QCF level

All units and qualifications within the QCF will have a level assigned to them, which represents the level of achievement. There are nine levels of achievement, from Entry Level to Level 8. The level of the unit has been informed by the QCF level descriptors and, where appropriate, the NOS and/or other sector/professional benchmarks.

Credit value

All units have a credit value. The minimum credit value that may be determined for a unit is one, and credits can only be awarded in whole numbers. Learners will be awarded credits for the successful completion of whole units.

Guided learning hours

Guided learning hours are defined as all the times when a tutor, trainer or facilitator is present to give specific guidance towards the learning aim being studied on a programme. This definition includes lectures, tutorials and supervised study in, for example, open learning centres and learning workshops. It also includes time spent by staff assessing learners' achievements. It does not include time spent by staff in day-to-day marking of assignments or homework where the learner is not present.

Unit aim

The aim provides a clear summary of the purpose of the unit and is a succinct statement that summarises the learning outcomes of the unit.

Learning outcomes

The learning outcomes of a unit set out what a learner is expected to know, understand or be able to do as the result of a process of learning.

Assessment criteria

The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or set of learning outcomes, has been achieved. The learning outcomes and assessment criteria clearly articulate the learning achievement for which the credit will be awarded at the level assigned to the unit.

Units

Unit 1: Medical Principles for the Administrator	17
Unit 2: Medical Administration	19
Unit 3: Managing Communication in a Medical Environment	23
Unit 4: Medical Word Processing and Audio Transcription	25
Unit 5: Medical Terminology	27
Unit 6: Medical Terminology	35
Unit 7: Work Experience in a Medical Environment	37
Unit 8: Legal Aspects of Medical Administration	41
Unit 9: Spreadsheet Software	43
Unit 10: Database Software	47
Unit 11: Presentation Software	49
Unit 12: Spreadsheet Software	53
Unit 13: Presentation Software	57

Unit 1: Medical Principles for the Administrator

Unit code: J/600/2488

QCF Level 2: BTEC Specialist

Credit value: 9

Guided learning hours: 70

Unit aim

The aim of this unit is to equip the learner with specialised medical knowledge of administration in a healthcare environment. It will enable the learner to understand health promotion (HP) and the role of the medical administrator in giving advice on health. They will learn how to maintain a safe and healthy environment through the prevention of infection and how the principles of medical ethics, etiquette and confidentiality apply to medical administration. The learner will also develop an understanding of the work of the pathology and clinical imaging departments and a basic knowledge of drug classification, human anatomy and physiology.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes		Assessment criteria	
1	Understand the principles of Health Promotion / Preventive Medicine	1.1	Describe the role of Health Promotion (HP)/Preventive Medicine (PM) in the workplace
		1.2	Explain the role and limitations of the medical administrator in supporting Health Promotion
		1.3	Explain the purpose of screening and diagnostic tests
2	Understand the principles of infection	2.1	Describe the causes and effects of infection in the body
		2.2	Explain how cross infection is controlled in a medical environment

Learning outcomes		Assessment criteria	
3	Understand the role and function of the Diagnostic Departments	3.1	Describe the function of the Pathology Department including job roles
		3.2	Describe the function of the Clinical Imaging Department including job roles
4	Understand the principles of medical ethics and medical etiquette	4.1	Explain the meaning of medical ethics and medical etiquette and how they may be maintained
		4.2	Explain the importance of maintaining patient confidentiality
5	Understand the principles regarding drugs used in medicine	5.1	Explain the legal requirements of drugs used in medicine
		5.2	Describe the classification of drugs
6	Understand the basic anatomy and physiology of the organs of the human body (including the bones)	6.1	Identify the main bones and their position in the human body
		6.2	Describe the main organs of the human body including their position, function and the related system

Unit 2: Medical Administration

Unit code: K/600/2502

QCF Level 3: BTEC Specialist

Credit value: 9

Guided learning hours: 70

Unit aim

This unit has been designed to provide the learner with the essential knowledge and skills that would enable them to fulfil the role of medical secretary. It provides the learner with an understanding of administrative procedures and the skills and qualities required to provide effective secretarial support in a medical environment. They will learn how to work as part of a medical team and gain an understanding of how to manage their own time and workload and manage information.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes		Assessment criteria	
1	Understand the role and responsibilities of the medical secretary	1.1	Explain the skills, qualities, and core knowledge required of the medical secretary and their importance
		1.2	Describe the range of duties carried out by the medical secretary
		1.3	Describe how to deal with incoming and outgoing mail
		1.4	Evaluate the use of different postal services

Learning outcomes		Assessment criteria	
		1.5	Describe the procedure for receiving and making telephone calls
		1.6	Explain the importance of accountability when handling cash
		1.7	Explain the principles of managing petty cash
		1.8	Describe how to organise a meeting
		1.9	Explain the role of the secretary in relation to stock control, including stationery
		1.10	Describe the additional responsibilities of the medical secretary in private practice
2	Understand medical administrative procedures	2.1	Describe the patient's route from primary to secondary care
		2.2	Explain the different types of hospital admission and the related procedures
		2.3	Describe the procedures involved in making new and follow-up appointments
		2.4	Explain the purpose of the five sections of hospital case notes
		2.5	Describe patient discharge procedures
		2.6	Describe the procedures that must be followed when a patient dies
		2.7	Describe how to register new and temporary patients in general practice
		2.8	Describe the main features of a primary care medical record and the secretary's involvement with it
		2.9	Evaluate different types of appointment system in primary care
		2.10	Describe the circumstances under which a patient can be removed from the Practice List

Learning outcomes		Assessment criteria	
3	Understand the importance of team work in a medical environment	3.1	Explain the features of a successful healthcare team
		3.2	Explain the benefits of teamwork within a health care setting
4	Understand how to manage time and workload	4.1	Evaluate the use of the diary in the medical environment
		4.2	Explain how the medical secretary can maintain a manageable workload
5	Understand how to manage and store information in a medical environment	5.1	Describe the different types of information managed in a medical environment
		5.2	Describe file management systems
		5.3	Describe how to set up a filing system for own workspace
		5.4	Identify the principles of the Data Protection Act 1998
		5.5	Describe different sources of information on medical and non-medical data
		5.6	Describe how computerised patient administration systems (PAS) are used
		5.7	Describe common problems found when accessing medical records
6	Understand the importance of continuous improvement	6.1	Describe different techniques used in individual development
		6.2	Explain the impact of continuous professional development (CPD) on the organisation and the individual

Unit 3: Managing Communication in a Medical Environment

Unit code: T/600/2504

QCF Level 3: BTEC Specialist

Credit value: 8

Guided learning hours: 55

Unit aim

The aim of this unit is to enable the learner to develop understanding of the communication skills necessary to work in a healthcare team within general practice, hospitals, social care and other associated organisations. The unit can be used as a progression route from Level 2 Communication Skills in a Medical Environment or can be a development for learners with general administrative skills. It will enable the learner to support the work of the healthcare team through production of appropriate documentation. This will include correspondence, documents to support meetings and documents designed for information gathering, all in an appropriate form and with a suitable tone. In addition, the unit will equip the learner with the skills to communicate effectively in a range of difficult situations, including face-to-face and on the telephone.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes		Assessment criteria	
1	Know how to administer meetings in a medical environment	1.1	Describe meeting procedures and the role of key personnel
		1.2	Compose draft documents to support the meetings in a medical environment

Learning outcomes		Assessment criteria	
2	Be able to summarise and present information for use in a medical environment	2.1	Read and extract information for a specific purpose
		2.2	Synthesise information from different sources
		2.3	Present summarised information in a suitable format
3	Be able to design documentation for collecting information and data	3.1	Design formats for collecting information
		3.2	Design formats for collecting numerical data
4	Be able to produce draft correspondence to support the work of a healthcare team	4.1	Produce different types of draft correspondence for internal and external readers
		4.2	Use structure and tone to guide and influence the reader
5	Understand how to manage face-to-face communication	5.1	Describe how to contribute to group situations and team meetings
		5.2	Explain the different types of barriers to communication
		5.3	Explain how to use different techniques to assist in routine and difficult face-to-face communication
6	Understand how to manage telephone communication in a medical environment	6.1	Explain why the telephone may be a barrier to communication
		6.2	Describe the features of telephone technique
		6.3	Explain how to maintain confidentiality while using the telephone

Unit 4: Medical Word Processing and Audio Transcription

Unit code:	F/600/2506
QCF Level 3:	BTEC Specialist
Credit value:	13
Guided learning hours:	120

Unit aim

The aim of the unit is to enable the learner to develop the knowledge and skills to accurately produce professional documentation appropriate for the medical environment. They will learn how to use word processing techniques and audio transcription skills to edit, format and print a range of standard and more complex medical and business documents.

This unit is for learners who are aiming for employment that involves more complex word processing and audio transcription within a medical context and a business environment.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes		Assessment criteria	
1	Be able to manage electronic files	1.1	Create, name and rename files and folders
2	Be able to produce medical documents from handwritten and typewritten material	2.1	Create new documents containing medical terminology
		2.2	Create, enter text and format a table within a document
3	Be able to recall, edit and format existing word processed documents	3.1	Recall a multi-page medical document and amend as instructed

Learning outcomes		Assessment criteria	
4	Be able to use mail merge functions	4.1	Create a standard medical document using variable merge codes
		4.2	Print documents showing variable merge codes
5	Be able to transcribe medical documents from audio	5.1	Transcribe documents from audio containing medical terminology
		5.2	Follow, interpret and implement audio conventions and instructions
6	Know how to proofread and correct errors	6.1	Correct spelling, grammar, punctuation, presentation and consistency errors including medical terminology
7	Be able to print documents	7.1	Name, save and print final copies of medical documents as instructed

Unit 5: Medical Terminology

Unit code: L/501/7452

QCF Level 3: BTEC Specialist

Credit value: 14

Guided learning hours: 60

Unit aim

The aim of this unit is to enable learners to demonstrate a high level of knowledge in the field of medical terminology.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes		Assessment criteria	
1	Know the structure of medical terms	1.1	Give a/the definition of individual prefixes, suffixes and roots (medical word parts)
		1.2	Produce a medical word part from a given definition
		1.3	Use word parts to produce an appropriate medical term and define the medical term
2	Know the Medical Terminology related to the body structure, functions and processes	2.1	Show an understanding of medical terminology related to the body structure, functions and processes by producing concise descriptions of medical terms
		2.2	Construct medical terms related to the body structure, functions and processes when given a description of the term
		2.3	Construct appropriate medical terms from a given medical word part
		2.4	State the meaning of abbreviations in the medical field

Learning outcomes		Assessment criteria	
3	Know the Medical Terminology related to the skeletal/locomotor system	3.1	Show an understanding of medical terminology related to this system by producing concise descriptions of medical terms
		3.2	Construct medical terms related to this system when given a description of the term
		3.3	Construct appropriate medical terms from a given medical word part
		3.4	State the meaning of abbreviations in the medical field
4	Know the Medical Terminology related to the blood	4.1	Show an understanding of medical terminology related to the blood by producing concise descriptions of medical terms
		4.2	Construct medical terms related to the blood when given a description of the term
		4.3	Construct appropriate medical terms from a given medical word part
		4.4	State the meaning of abbreviations in the medical field
5	Know the Medical Terminology related to the Cardiovascular System	5.1	Show an understanding of medical terminology related to this system by producing concise descriptions of medical terms
		5.2	Construct medical terms related to this system when given a description of the term
		5.3	Construct appropriate medical terms from a given medical word part
		5.4	State the meaning of abbreviations in the medical field

Learning outcomes		Assessment criteria	
6	Know the Medical Terminology related to the Lymphatic System	6.1	Show an understanding of medical terminology related to this system by producing concise descriptions of medical terms
		6.2	Construct medical terms related to this system when given a description of the term
		6.3	Construct appropriate medical terms from a given medical word part
		6.4	State the meaning of abbreviations in the medical field
7	Know the Medical Terminology related to the Respiratory System	7.1	Show an understanding of medical terminology related to this system by producing concise descriptions of medical terms
		7.2	Construct medical terms related to this system when given a description of the term
		7.3	Construct appropriate medical terms from a given medical word part
		7.4	State the meaning of abbreviations in the medical field
8	Know the Medical Terminology related to the Digestive System	8.1	Show an understanding of medical terminology related to this system by producing concise descriptions of medical terms
		8.2	Construct medical terms related to this system when given a description of the term
		8.3	Construct appropriate medical terms from a given medical word part
		8.4	State the meaning of abbreviations in the medical field

Learning outcomes		Assessment criteria	
9	Know the Medical Terminology related to the Urinary System	9.1	Show an understanding of medical terminology related to this system by producing concise descriptions of medical terms
		9.2	Construct medical terms related to this system when given a description of the term
		9.3	Construct appropriate medical terms from a given medical word part
		9.4	State the meaning of abbreviations in the medical field
10	Know the Medical Terminology related to the Nervous System (including mental health)	10.1	Show an understanding of medical terminology related to this system by producing concise descriptions of medical terms
		10.2	Construct medical terms related to this system when given a description of the term
		10.3	Construct appropriate medical terms from a given medical word part
		10.4	State the meaning of abbreviations in the medical field
11	Know the Medical Terminology related to the Male Reproductive System	11.1	Show an understanding of medical terminology related to this system by producing concise descriptions of medical terms
		11.2	Construct medical terms related to this system when given a description of the term
		11.3	Construct appropriate medical terms from a given medical word part
		11.4	State the meaning of abbreviations in the medical field

Learning outcomes		Assessment criteria	
12	Know the Medical Terminology related to the Female Reproductive System (including pregnancy and childbirth)	12.1	Show an understanding of medical terminology related to this system by producing concise descriptions of medical terms
		12.2	Construct medical terms related to this system when given a description of the term
		12.3	Construct appropriate medical terms from a given medical word part
		12.4	State the meaning of abbreviations in the medical field
13	Know the Medical Terminology related to the Endocrine System	13.1	Show an understanding of medical terminology related to this system by producing concise descriptions of medical terms
		13.2	Construct medical terms related to this system when given a description of the term
		13.3	Construct appropriate medical terms from a given medical word part
		13.4	State the meaning of abbreviations in the medical field
14	Know the Medical Terminology related to the Skin	14.1	Show an understanding of medical terminology related to the skin by producing concise descriptions of medical terms
		14.2	Construct medical terms related to this system when given a description of the term
		14.3	Construct appropriate medical terms from a given medical word part
		14.4	State the meaning of abbreviations in the medical field

Learning outcomes		Assessment criteria	
15	Know the Medical Terminology related to the Sensory Organs (the eye, the ear the nose and the mouth)	15.1	Show an understanding of medical terminology related to the sensory organs by producing concise descriptions of medical terms
		15.2	Construct medical terms related to these organs when given a description of the term
		15.3	Construct appropriate medical terms from a given medical word part
		15.4	State the meaning of abbreviations in the medical field
16	Know the Medical Terminology related to the Immune system and body's response to infection including Preventive Medicine	16.1	Show an understanding of medical terminology related to this area by producing concise descriptions of medical terms
		16.2	Construct medical terms related to this area when given a description of the term
		16.3	Construct appropriate medical terms from a given medical word part
		16.4	State the meaning of abbreviations in the medical field
17	Know the Medical Terminology related to Clinical Imaging	17.1	Show an understanding of terminology related to this area by producing concise descriptions of terms
		17.2	Construct medical terms related to this area when given a description of the term
		17.3	Construct appropriate medical terms from a given medical word part
		17.4	State the meaning of abbreviations in the medical field

Learning outcomes		Assessment criteria	
18	Know the Medical Terminology related to Drugs and Prescribing	18.1	Show an understanding of terminology related to this area by producing concise descriptions of terms
		18.2	Construct medical terms related to this area when given a description of the term
		18.3	Construct appropriate medical terms from a given medical word part
		18.4	State the meaning of abbreviations in the medical field
19	Know a range of other Medical Terminology within the following proscribed areas: <ul style="list-style-type: none"> • Miscellaneous abbreviations e.g. RTA (road traffic accident) • The names of specialities e.g. oncology • Qualifications for medical practitioners e.g. MB • Classification of diseases and associated terms • pathogenic micro organisms • colours, measures and descriptive words (hot/cold, large/small) 	19.1	Show an understanding of terminology related to this area by producing concise descriptions of terms
		19.2	Construct medical terms related to this area when given a description of the term
		19.3	Construct appropriate medical terms from a given medical word part
		19.4	State the meaning of abbreviations in the medical field

Unit 6: Medical Terminology

Unit code: T/501/7414

QCF Level 2: BTEC Specialist

Credit value: 6

Guided learning hours: 45

Unit aim

The aim of this unit is to enable the learner to develop a basic knowledge of how to accurately construct, identify and use a specified range of medical terminology.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes		Assessment criteria	
1	Know the structure and meaning of medical terms	1.1	Produce correct definitions of individual prefixes, suffixes and roots (medical word parts) from the list prescribed
		1.2	Produce an appropriate medical term built from the prescribed list of word parts
		1.3	Produce correct definitions of medical terms produced/built from the prescribed list of word parts
		1.4	Correctly match word parts or complete terms against given definitions
		1.5	Produce correct medical terms from a given definition (using the prescribed list)

Learning outcomes		Assessment criteria	
2	Know the meaning of medical terms relating to the body systems	2.1	<p>Produce correct definitions of medical terms concerning the following body systems:</p> <ul style="list-style-type: none"> • body structure • skeletal /locomotor • cardiovascular • lymphatic & immune system including body's response to infection • respiratory • digestive • urinary • reproductive
		2.2	Match medical words against definitions correctly
3	Know the meaning of medical terms for the different medical specialties	3.1	Produce correct definitions of medical terms relating to medical specialties
		3.2	Match medical words against definitions correctly
4	Know the meaning of abbreviations concerning drugs and prescriptions	4.1	Give the correct meaning of abbreviations (approved by the British National Formulary) concerning drugs and prescriptions

Unit 7: Work Experience in a Medical Environment

Unit code: D/600/2500

QCF Level 2: BTEC Specialist

Credit value: 5

Guided learning hours: 20

Unit aim

The aim of this unit is to provide the learner with the knowledge and understanding to enable them to work as a medical receptionist/administrator within a range of medical environments.

It will provide them with a basic knowledge of the structure of National Health Service and an understanding of health and safety, employment legislation and the principles of data protection. They will also develop an understanding of the appraisal process within the healthcare sector and the importance of personal development. They will gain an understanding of patients' rights and of the administrator's role in the complaints process.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes		Assessment criteria	
1	Be able to communicate with other people in a medical environment	1.1	Listen actively to information that other people are communicating
		1.2	Ask questions to clarify and check information
		1.3	Provide accurate, clear and structured information to other people
		1.4	Provide information in a way that meets the needs of other people
		1.5	Read written material to identify information needed

Learning outcomes		Assessment criteria	
		1.6	Use appropriate tone, language and body language when dealing with patients, visitors and colleagues
		1.7	Respond appropriately to incoming telephone calls
2	Understand the medical organisation/setting in which they work	2.1	Describe the organisation's function and purpose
		2.2	Explain how the organisation links with other organisations and facilities
		2.3	Describe own team and its role within the organisation
		2.4	Describe how own role contributes to the organisation
3	Be able to work with other people	3.1	Treat work colleagues with honesty, respect and consideration
		3.2	Work in a way that supports the team and its objectives
		3.3	Agree objectives with the people they work with
		3.4	Keep other people informed about own progress
		3.5	Help and support other people in their work
4	Be able to follow agreed guidelines, procedures and codes of practice in a medical environment	4.1	Follow organisational requirements in relation to security of information and patient confidentiality
		4.2	Follow the policies, systems and procedures that are relevant to own role
		4.3	Store and retrieve information securely using the organisation's systems
		4.4	Use technology, equipment and resources safely
		4.5	Follow basic health and safety legislation

Learning outcomes		Assessment criteria	
5	Be able to improve own performance in a medical environment	5.1	Agree working methods and standards to be achieved
		5.2	Agree realistic targets and an achievable timescale for work tasks
		5.3	Show a willingness to take on new challenges
		5.4	Take responsibility for own work
		5.5	Prioritise tasks and manage own time
		5.6	Complete work to agreed standards and timescale

Unit 8: Legal Aspects of Medical Administration

Unit code: J/600/2507
QCF Level 3: BTEC Specialist
Credit value: 7
Guided learning hours: 54

Unit aim

The aim of this unit is to enable the learner to develop an understanding of the health service organisation and its statutory bodies and how legislation applies to the health service. The learner will develop knowledge of patients' rights, how they are protected and how the role of the medical secretary/administrator is vital to that protection.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes		Assessment criteria	
1	Understand the organisational structure of healthcare in the UK	1.1	Describe the current structure of the National Health Service
		1.2	Explain the main functions of each of the bodies within the NHS structure and how they support each other
		1.3	Explain the role of private healthcare
2	Understand the role of the social worker in healthcare	2.1	Describe the role of the social worker in relation to the health and social care of the individual

Learning outcomes		Assessment criteria	
3	Understand how principal legislation affects the patient, employee and employer within the NHS	3.1	Explain current mental health legislation in relation to patient treatment
		3.2	Explain the significance of a 'legal duty of care' in relation to the health service and the effects of vicarious liability
		3.3	Define medical negligence and explain the implications of negligence for <ul style="list-style-type: none"> • the patient • the NHS employee • the NHS
		3.4	Explain the tort of trespass to the person with reference to consent to treatment and examinations
		3.5	Explain the purpose of a written contract of employment
		3.6	Explain how legislation relating to discrimination protects the employee, the employer and NHS service users
		3.7	Explain the principles of legislation relating to health and safety at work including accident reporting and visual display regulations
4	Understand how to maintain patients' rights	4.1	Explain patients' rights
		4.2	Explain how legislation protects patient information
		4.3	Explain the role of the secretary/administrator in the safeguarding of patient confidentiality
		4.4	Explain the complaints procedure

Unit 9: Spreadsheet Software

Unit code:	F/502/4625
QCF Level 2:	BTEC Specialist
Credit value:	4
Guided learning hours:	30

Unit aim

This unit is about the ability to use IT systems sensibly and purposefully to meet needs, to do so safely and securely in line with organisational guidelines, to respond appropriately to IT problems and to evaluate the use of IT systems.

Unit introduction

This unit is about the skills and knowledge required by an IT user to select and use a wide range of intermediate spreadsheet software tools and techniques to produce, present, and check spreadsheets that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.

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

- the range of data entry, manipulation and outputting techniques will be at times non-routine or unfamiliar;
- the tools, formulas and functions needed to analyse and interpret the data requires knowledge and understanding (for example, mathematical, logical, statistical or financial); and
- the user will take some responsibility for setting up or developing the structure and functionality of the spreadsheet.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes		Assessment criteria	
1	Use a spreadsheet to enter, edit and organise numerical and other data	1.1	Identify what numerical and other information is needed in the spreadsheet and how it should be structured
		1.2	Enter and edit numerical and other data accurately
		1.3	Combine and link data across worksheets
		1.4	Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available
2	Select and use appropriate formulas and data analysis tools to meet requirements	2.1	Identify which tools and techniques to use to analyse and manipulate data to meet requirements
		2.2	Select and use a range of appropriate functions and formulas to meet calculation requirements
		2.3	Use a range of tools and techniques to analyse and manipulate data to meet requirements
3	Select and use tools and techniques to present and format spreadsheet information	3.1	Plan how to present and format spreadsheet information effectively to meet needs
		3.2	Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets
		3.3	Select and format an appropriate chart or graph type to display selected information

Learning outcomes	Assessment criteria		
	3.4	Select and use appropriate page layout to present and print spreadsheet information	
	3.5	Check information meets needs, using spreadsheet tools and making corrections as necessary	
	3.6	Describe how to find errors in spreadsheet formulas	
	3.7	Respond appropriately to any problems with spreadsheets	

Unit 10: Database Software

Unit code: M/502/4555

QCF Level 2: BTEC Specialist

Credit value: 4

Guided learning hours: 30

Unit aim

This unit is about the ability to use IT systems sensibly and purposefully to meet needs, to do so safely and securely in line with organisational guidelines, to respond appropriately to IT problems and to evaluate the use of IT systems.

Unit introduction

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

- enter information into databases, that is at times non-routine or unfamiliar;
- retrieve information by creating queries using multiple selection criteria; and
- produce reports by setting up menus or short cuts.

They will also be able to create and modify single table, non-relational databases. Any aspects that are unfamiliar may require support and advice from others.

Database tools, functions and techniques will be described as 'intermediate' because:

- the software tools and functions involved will at times be non-routine or unfamiliar; and
- the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes		Assessment criteria	
1	Create and modify non-relational database tables	1.1	Identify the components of a database design
		1.2	Describe the field characteristics for the data required
		1.3	Create and modify database tables using a range of field types
		1.4	Describe ways to maintain data integrity
		1.5	Respond appropriately to problems with database tables
		1.6	Use database tools and techniques to ensure data integrity is maintained
2	Enter, edit and organise structured information in a database	2.1	Create forms to enter, edit and organise data in a database
		2.2	Select and use appropriate tools and techniques to format data entry forms
		2.3	Check data entry meets needs, using IT tools and making corrections as necessary
		2.4	Respond appropriately to data entry errors
3	Use database software tools to run queries and produce reports	3.1	Create and run database queries using multiple criteria to display or amend selected data
		3.2	Plan and produce database reports from a single table non-relational database
		3.3	Select and use appropriate tools and techniques to format database reports
		3.4	Check reports meet needs, using IT tools and making corrections as necessary

Unit 11: Presentation Software

Unit code: M/502/4622

QCF Level 2: BTEC Specialist

Credit value: 4

Guided learning hours: 30

Unit aim

This unit is about the ability to use IT systems sensibly and purposefully to meet needs, to do so safely and securely in line with organisational guidelines, to respond appropriately to IT problems and to evaluate the use of IT systems.

Unit introduction

This unit is about the skills and knowledge required by an IT user to select and use a wide range of intermediate presentation software tools and techniques effectively to produce presentations which include a combination of media (eg images, animation and sound) for education, entertainment or information sharing) and are at times non-routine or unfamiliar.

Any aspect that is unfamiliar may require support and advice from others.

Presentation tools and techniques at this level will be described as 'intermediate' because:

- the software tools and functions used will be at times non-routine or unfamiliar;
- the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements; and
- the user will take some responsibility for inputting, structuring, editing and presenting the information, which at times may be non-routine or unfamiliar.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes		Assessment criteria	
1	Input and combine text and other information within presentation slides	1.1	Identify what types of information are required for the presentation
		1.2	Enter text and other information using layouts appropriate to type of information
		1.3	Insert charts and tables into presentation slides
		1.4	Insert images, video or sound to enhance the presentation
		1.5	Identify any constraints which may affect the presentation
		1.6	Organise and combine information of different forms or from different sources for presentations
		1.7	Store and retrieve presentation files effectively, in line with local guidelines and conventions where available
2	Use presentation software tools to structure, edit and format slide sequences	2.1	Identify what slide structure and themes to use
		2.2	Select, change and use appropriate templates for slides
		2.3	Select and use appropriate techniques to edit slides and presentations to meet needs
		2.4	Select and use appropriate techniques to format slides and presentations
		2.5	Identify what presentation effects to use to enhance the presentation
		2.6	Select and use animation and transition effects appropriately to enhance slide sequences

Learning outcomes		Assessment criteria	
3	Prepare slideshow for presentation	3.1	Describe how to present slides to meet needs and communicate effectively
		3.2	Prepare slideshow for presentation
		3.3	Check presentation meets needs, using IT tools and making corrections as necessary
		3.4	Identify and respond to any quality problems with presentations to ensure that presentations meet needs

Unit 12: Spreadsheet Software

Unit code:	J/502/4626
QCF Level 3:	BTEC Specialist
Credit value:	6
Guided learning hours:	45

Unit aim

This unit is about the ability to use IT systems sensibly and purposefully to meet needs, to do so safely and securely in line with organisational guidelines, to respond appropriately to IT problems and to evaluate the use of IT systems.

Unit introduction

This unit is about the skills and knowledge required by an IT user to select and use a wide range of advanced spreadsheet software tools and techniques to produce, present and check complex and non-routine spreadsheets.

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

- the range of data entry, manipulation and outputting techniques will be complex and non-routine;
- the tools, formulas and functions needed to analyse and interpret the required information require complex and non-routine knowledge and understanding (for example, data restrictions, data validation using formula, pivot tables, data maps); and
- the user will take full responsibility for setting up and developing the functionality of the spreadsheet.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the un

On completion of this unit a learner should:

Learning outcomes		Assessment criteria	
1	Use a spreadsheet to enter, edit and organise numerical and other data	1.1	Identify what numerical and other information is needed in the spreadsheet and how it should be structured
		1.2	Enter and edit numerical and other data accurately
		1.3	Combine and link data from different sources
		1.4	Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available
2	Select and use appropriate formulas and data analysis tools and techniques to meet requirements	2.1	Explain what methods can be used to summarise, analyse and interpret spreadsheet data and when to use them
		2.2	Select and use a wide range of appropriate functions and formulas to meet calculation requirements
		2.3	Select and use a range of tools and techniques to analyse and interpret data to meet requirements
		2.4	Select and use forecasting tools and techniques

Learning outcomes		Assessment criteria	
3	Use tools and techniques to present, and format and publish spreadsheet information	3.1	Explain how to present and format spreadsheet information effectively to meet needs
		3.2	Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets effectively
		3.3	Select and use appropriate tools and techniques to generate, develop and format charts and graphs
		3.4	Select and use appropriate page layout to present, print and publish spreadsheet information
		3.5	Explain how to find and sort out any errors in formulas
		3.6	Check spreadsheet information meets needs, using IT tools and making corrections as necessary
		3.7	Use auditing tools to identify and respond appropriately to any problems with spreadsheets

Unit 13: Presentation Software

Unit code: T/502/4623

QCF Level 3: BTEC Specialist

Credit value: 6

Guided learning hours: 45

Unit aim

This unit is about the ability to use IT systems sensibly and purposefully to meet needs, to do so safely and securely in line with organisational guidelines, to respond appropriately to IT problems and to evaluate the use of IT systems.

Unit introduction

This unit is about the skills and knowledge required by an IT user to select and use a wide range of advanced presentation software tools and techniques effectively to produce presentations that include a combination of media (eg images, animation and sound) for education, entertainment or information sharing, and are complex or non-routine.

Presentation tools and techniques will be described as 'advanced' because:

- the software tools and functions used will be complex and at times require new learning, which will 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;
- the inputting, manipulating and outputting techniques will be complex, and will involve research, identification and application; and
- the user will take full responsibility for inputting, structuring, editing and presenting the information.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

On completion of this unit a learner should:

Learning outcomes		Assessment criteria	
1	Input and combine text and other information within presentation slides	1.1	Explain what types of information are required for the presentation
		1.2	Enter text and other information using layouts appropriate to type of information
		1.3	Insert charts and tables and link to source data
		1.4	Insert images, video or sound to enhance the presentation
		1.5	Identify any constraints which may affect the presentation
		1.6	Organise and combine information for presentations in line with any constraints
		1.7	Store and retrieve presentation files effectively, in line with local guidelines and conventions where available
2	Use presentation software tools to structure, edit and format presentations	2.1	Explain when and how to use and change slide structure and themes to enhance presentations
		2.2	Create, amend and use appropriate templates and themes for slides
		2.3	Explain how interactive and presentation effects can be used to aid meaning or impact
		2.4	Select and use appropriate techniques to edit and format presentations to meet needs
		2.5	Create and use interactive elements to enhance presentations
		2.6	Select and use animation and transition techniques appropriately to enhance presentations

Learning outcomes		Assessment criteria	
3	Prepare interactive slideshow for presentation	3.1	Explain how to present slides to communicate effectively for different contexts
		3.2	Prepare interactive slideshow and associated products for presentation
		3.3	Check presentation meets needs, using IT tools and making corrections as necessary
		3.4	Evaluate presentations, identify any quality problems and discuss how to respond to them
		3.5	Respond appropriately to quality problems to ensure that presentations meet needs and are fit for purpose

Further information

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Useful publications

Related information and publications include:

- *Guidance for Centres Offering Edexcel/BTEC QCF Accredited Programmes* (Edexcel, distributed to centres annually)
- Functional skills publications – specifications, tutor support materials and question papers
- *Regulatory arrangements for the Qualification and Credit Framework* (published by Ofqual) August 2008
- the current Edexcel publications catalogue and update catalogue.

Edexcel publications concerning the Quality Assurance System and the internal and external verification of vocationally related programmes can be found on the Edexcel website and in the Edexcel publications catalogue.

NB: Some of our publications are priced. There is also a charge for postage and packing. Please check the cost when you order.

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Website: e-skills.com

Professional development and training

Edexcel supports UK and international customers with training related to BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing student-centred learning and teaching approaches
- building functional skills into your programme
- building in effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on our website (www.edexcel.com/training). You can request customised training through the website or by contacting one of our advisers in the Training from Edexcel team via Customer Services to discuss your training needs.

Our customer service numbers are:

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

Calls may be recorded for training purposes.

The training we provide:

- is active – ideas are developed and applied
- is designed to be supportive and thought provoking
- builds on best practice.

Our training is underpinned by the LLUK standards for those preparing to teach and for those seeking evidence for their continuing professional development.

Annexe A

The Edexcel/BTEC qualification framework for the Business and Administration and Management and Team Leading sector

Progression opportunities within the framework.

Level	General qualifications	BTEC full vocationally-related qualifications	BTEC specialist courses	NVQ/occupational
8				
7			BTEC Level 7 Award/Certificate/Diploma/Extended Diploma in Strategic Management and Leadership (QCF)	Level 7 NVQ Diploma in Management (QCF)
6				
5		BTEC Level 5 HND Diploma in Business (QCF)	BTEC Level 5 Award/Certificate/Diploma in Management and Leadership (QCF)	Level 5 NVQ Diploma in Management (QCF)
4		BTEC Level 4 HNC Diploma in Business (QCF)		Level 4 NVQ Certificate/Diploma in Business and Administration (QCF)

Level	General qualifications	BTEC full vocationally-related qualifications	BTEC specialist courses	NVQ/occupational
3	GCE in Business GCE in Economics and Business Studies GCE Applied Business	BTEC Level 3 Certificate/Subsidiary Diploma/Diploma/Extended Diploma in Business (QCF) BTEC Level 3 Award/Certificate in Management (QCF)	<p>BTEC Level 3 Diploma for Medical Secretaries (QCF)</p> <p>BTEC Level 3 Certificate for Legal Secretaries (QCF)</p> <p>BTEC Level 3 Diploma for Legal Secretaries (QCF)</p>	Level 3 NVQ Certificate/Diploma in Business and Administration Level 3 NVQ Certificate in Management (QCF)
2		GCSE in Applied Business GCSE in Business Studies GCSE in Business Communications GCSE in Business Studies and Economics	<p>BTEC Level 2 Certificate/Extended Certificate/Diploma in Business</p> <p>BTEC Level 2 Award/Certificate in Team Leading (QCF)</p> <p>BTEC Level 2 Diploma in Medical Administration (QCF)</p> <p>BTEC Level 2 Certificate for Legal Secretaries (QCF)</p> <p>BTEC Level 2 Diploma for Legal Secretaries (QCF)</p>	Level 2 NVQ Award/Certificate/Diploma in Business and Administration (QCF) Level 2 NVQ Certificate in Team Leading (QCF)

Level	General qualifications	BTEC full vocationally-related qualifications	BTEC specialist courses	NVQ/occupational
1		BTEC Level 1 Award/Certificate/Diploma in Business Administration (QCF)		Level 1 NVQ Award/Certificate in Business and Administration (QCF)
Entry		BTEC Entry Level Award in Business Administration (Entry 3) (QCF)		

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**For more information on Edexcel and BTEC qualifications please
visit our website: www.edexcel.com**

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