

RECEPTION – LEVEL 1 – CCA001 01

To achieve the full award, candidates must complete all **Nine (9) Mandatory units.**

<u>Mandatory Units</u>	<u>Unit Number</u>
1 Create and maintain effective working relationships	U00106
1.1 Gain the trust and support of colleagues and team members	
1.2 Gain the trust and support of one's immediate manager	
2 Maintain customer care	U00206
2.1 Handle customers	
2.2 Handle customer complaints	
2.3 Handle customer incidents	
3 Maintain a safe and secure working environment	U00306
3.1 Maintain personal health and hygiene	
3.2 Carry out procedures in the event of fire	
3.3 Deal with the discovery of suspicious items/packages	
3.4 Carry out procedures in the event of an accident	
3.5 Maintain a safe work environment for customers, staff and visitors	
3.6 Maintain a secure environment for customers, staff and visitors	
4 Process information	U00501
4.1 Process incoming and outgoing telecommunications	
4.2 Supply information to meet specified requests	
4.3 Check and process routine numerical information	
5 Welcome, screen and assist guests and visitors	U00601
5.1 Meet and greet guests and visitors	
5.2 Screen and assist guest and visitors	
6 Maintain payment point and handle cash and non-cash payments	U00406
6.1 Maintain payment point for cash and non-cash payments	
6.2 Handle cash and non-cash payments	

RECEPTION - LEVEL 1 – CCA001 01

<u>Mandatory Units/Continued</u>		<u>Unit Number</u>
7	Operate and take care of equipment	U00701
	7.1 Follow instructions and operate equipment	
	7.2 Keep equipment in a clean and working condition	
8	Produce text following instructions	U00801
	8.1 Produce text using a keyboard	
	8.2 Produce copies using reprographic equipment	
9	Store and retrieve information using an established storage system	U00901
	9.1 Store information using an established storage system	
	9.2 Retrieve information using an established storage system	

U00106: Create and maintain effective working relationships

Unit Descriptor:

This unit describes the competence required to ensure that teams and individuals have effective working relationships. It covers what you should be doing to gain the trust and support of colleagues and team members and to gain the trust of your immediate manager.

This unit describes the essential abilities of:

- Team building
- Communicating effectively

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

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| 1. | Gain the trust and support of colleagues and team members | 1.1 | Communication with colleagues and team members about proposed activities take place at appropriate times and in a manner which encourages open, frank discussion. |
| | | 1.2 | Colleagues and team members are sufficiently informed about organization plans and activities. |
| | | 1.3 | Commitments made to colleagues and team members are realistic and honoured. |
| | | 1.4 | The manner in which colleagues and team members are treated shows respect for individuals and the need for confidentiality. |
| | | 1.5 | Colleagues and team members receive sufficient support to achieve work objectives. |

- 1.6 Evaluations of output and behaviour at work are discussed with colleagues and team members promptly and directly.
 - 1.7 Unexpected situations are dealt with effectively and the appropriate person(s) informed where necessary.
 - 1.8 All work is carried out in an organized and efficient manner in accordance with organizational procedures.
2. Gain the trust and support of one's immediate manager
- 2.1 The immediate manager receives timely and accurate reports on activities, issues, progress, results and achievements.
 - 2.2 The immediate manager receives clear, accurate and timely information about emerging threats and opportunities.
 - 2.3 The immediate manager is consulted about organizational policies and ways of working at appropriate times.
 - 2.4 Proposals for action are realistic, clear and presented at an appropriate time.
 - 2.5 Where there are disagreements with the immediate manager, constructive efforts are made to resolve them.
 - 2.6 Unexpected situations are dealt with effectively and the appropriate person(s) informed where necessary.
 - 2.7 All work is carried out in an organized and efficient manner in accordance with organizational procedures.

RANGE STATEMENT

You must cover the items below:

Element 1: Gain the trust and support of colleagues and team members**A. Colleagues:**

- (i) persons working at a lower level
- (ii) persons working at a higher level
- (iii) persons working at the same level

B. Team members:

- (i) persons with whom the individual works to fulfill line responsibilities
- (ii) persons with whom the individual works to fulfill functional responsibilities

Element 2: Gain the trust and support of one's immediate manager**C. Immediate Manager**

- (i) the person(s) to whom the individual reports
- (ii) the organization or authority to which the individual reports

D. Proposals

- (i) oral
- (ii) written

E. Disagreements

- (i) actual
- (ii) potential

UNDERPINNING KNOWLEDGE AND SKILLS**Working Relationships**

1. Why gaining the trust and support of colleagues and team members are important for effective performance.
2. How to encourage good working relationships and a feeling that colleagues and team members are respected.
3. Why gaining the trust and support of one's immediate manager is important to effective performance.
4. What types of emerging threats and opportunities the manager needs to be informed about and the degree of urgency attached to these.

Planning

5. Why commitments to colleagues need to be realistic and why they should be honoured.
6. What types of support colleagues and team members may require to achieve their objectives and how to respond effectively to these needs.

Communication

7. How to select appropriate times, methods and styles of consultation according to a range of issues and contexts.
8. What range of issues about which colleagues and team members need to be informed.
9. What range of communication methods are available and how to select methods appropriate to a range of issues and contexts.
10. Which types of information concerning team members and colleagues need to be treated confidentially and what procedures need to be followed to achieve this.
11. How to provide feedback in a way which will lead to a constructive outcome.
12. What types of disagreements may occur with the immediate manager and what are the methods of handling these in an appropriate manner.
13. Why the immediate manager needs to be kept informed of activities, progress, results and achievements.

14. How to develop and present proposals in a way which is realistic, clear and likely to influence the immediate manager's decision-making positively.
15. What range of communication methods can be used to keep the immediate manager informed and how to select an appropriate method according to the range of issues and contexts.

Organizational Policies and Procedures

16. What types of organizational policies and ways of working the manager needs to be informed about and what the appropriate methods of doing so are.

EVIDENCE GUIDE

(1) Critical Aspects of Evidence

You must provide evidence that shows you have met the performance criteria over a sufficient period of time for your assessor to consider that you are competent.

It is essential that competence be demonstrated in the following aspects:

- Totally through performance evidence in the form of observation and products of work or
- Performance evidence to cover **all** of the **performance criteria 1.1 -1.8** and a minimum of two (2) items from the range of A and one (1) item from the range of B
- By performance evidence to cover **all** of the **performance criteria 2.1 – 2.7** and a minimum of **one** (1) item from the range of C, **one** (1) item from the range of D, **one** (1) item from the range of E and
- By supplementary evidence in the form of questioning and/or personal statements and/or witness testimony to cover the rest of the range.
- Evidence to cover the underpinning knowledge should be collected using questioning which may be oral, written or using visual aids.

(2) Methods of Assessment

- Observation record by your assessor of you :
 - o consult with colleagues and give feedback
 - o present progress reports to and consulting with those to whom you report
- Notes and minutes of relevant meetings.
- Papers you have produced.
- Your appraisal reports.
- Documented feedback from those to whom you report.
- Relevant letters and memos
- Briefing documents you have produced on organisational plans and activities.

- Answers written or oral questions from your assessors.
- Personal statements describing how you ensure that you:
 - o honour commitments you make to colleagues and how the way you treat colleagues shows your respect for individuals and the need for confidentiality.
 - o resolved disagreements with those to whom you report.
- Witness testimony from persons who have witnessed you gaining the trust and support of colleagues.
- Witness testimony from those to whom you report on how you enhanced their trust and support.

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual work environment. Simulation will only be accepted where specified.

U00206: Maintain customer care

Unit Descriptor:

This unit describes the competence required to maintain customer care.

This unit describes the essential abilities of:

- Responding to customer needs
- Communicating effectively
- Problem solving
- Operating within organisational procedures

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

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|----|------------------|-----|---|
| 1. | Handle customers | 1.1 | Customers are dealt with in a polite and helpful manner at all times. |
| | | 1.2 | Customers' needs and requirements are acted upon without delay. |
| | | 1.3 | Accurate information is given in answer to all customers' enquiries or customer is referred to the relevant alternative information source. |
| | | 1.4 | Information given is within scope of the individual's authority. |
| | | 1.5 | Customers' comments are politely acknowledged and passed on where necessary. |
| | | 1.6 | Unexpected situations are dealt with effectively and the appropriate person(s) are informed where necessary. |

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2. Handling customer complaints
- 1.7 All work is carried out in an organized and efficient manner in accordance with organisational procedures.
 - 2.1 Dissatisfied customers are acknowledged immediately and are attended without delay.
 - 2.2 Customers are dealt with in a polite and helpful manner and at all times.
 - 2.3 Nature of customer complaint is quickly identified and priorities are established.
 - 2.4 Customers are assured that complaints will receive immediate attention.
 - 2.5 Complaints which can be resolved within the individual's authority are dealt with immediately.
 - 2.6 Complaints which cannot be resolved within the individual's authority are referred to the appropriate person(s).
 - 2.7 Complaints are reported and dealt with in accordance with organisational procedures.
 - 2.8 Follow up action is taken in a timely manner and in accordance with organisation procedures.
 - 2.9 Unexpected situations are dealt with effectively and the appropriate persons informed where necessary.
 - 2.10 All work is carried out in an organized and efficient manner in accordance with organisational procedures.

- 3 Handling customer incidents
 - 3.1 Nature of customer incident is quickly identified and priorities are established.
 - 3.2 Customers are dealt with in a polite and helpful manner at all times.
 - 3.3 Customers are assured that incident will receive immediate attention.
 - 3.4 Customers' incidents which can be resolved within the individual's authority are dealt with as soon as possible in a calm manner.
 - 3.5 Customers' incidents which cannot be resolved within the individual's authority are referred to the appropriate authority.
 - 3.6 Customers' incidents are dealt with and reported in accordance with organisational and legal requirements.
 - 3.7 Unexpected situations are dealt with effectively and the appropriate person(s) informed where necessary.
 - 3.8 All work is carried out in an organized and efficient manner in accordance with organisational procedures.

RANGE STATEMENT

You must cover the items below:

Element 1: Handle customers

A. Customers: *(Also applies to elements 2 and 3)*

- (i) adults
- (ii) children
- (iii) persons with special needs (e.g. visually impaired, hearing impaired, mobility impaired, persons with medical conditions e.g. diabetic)

B. Unexpected situations:

- (i) customer complaints
- (ii) customer incidents

Element 2: Handle customers complaints

C. Complaints:

- (i) unusual situations e.g. weather
- (ii) service related incidents
- (iii) physical facilities

Element 3: Handle customer incidents

D. Customer Incidents:

- (i) spillage
- (ii) breakage
- (iii) lost property
- (iv) equipment faults
- (v) sudden illness/injury

E. Report Format:

- (i) written
- (ii) oral

UNDERPINNING KNOWLEDGE AND SKILLS**Health and Safety**

1. Why it is important to comply with health and safety regulations.
2. Where and from whom information on current health and safety regulations can be obtained.

Customer Care

3. Why it is important that information given to customers is accurate and disclosable.
4. Why customer comments should be reported to the appropriate person.
5. Why customer complaints should be dealt with without delay.
6. How to source relevant information to deal with customer enquiries.

Communication

7. When to seek assistance and when to use own initiative in meeting customer's needs.
8. What the formal and informal methods to satisfy customer needs within the resources available are and when it is appropriate to use them.
9. How to interpret customer feelings through body language, sensitive questioning and observation.
10. What customer complaints should be dealt with without delay.
11. Why it is important to establish priorities when dealing with customer complaints.

Customer Incidents

12. Why customer incidents should be dealt with without delay.
13. Why and to whom all customer incidents should be reported.

EVIDENCE GUIDE

(1) Critical Aspects of Evidence

- Totally through performance evidence in the form of observation or
- By performance evidence in the form of observation to cover **performance criteria 1.1, 1.2, 1.3** and a minimum of two (2) items from range A and
- By performance evidence in the form of observation to cover **performance criteria 2.1 – 2.8** and a minimum of two (2) items from range A and relevant items from range C
- By supplementary evidence in the form of questioning and/or role-play and/or witness testimony to cover the rest of the **performance criteria 3.1 – 3.8** and range A, D and E

(2) Methods of Assessment

- Observation reports by assessors of how you:
 - o deal with customers,
 - o dealt with customer complaints
 - o deal with customer incidents.
- Copies of written communication to and from customers.
- Answers to oral or written questions from your assessor (these questions and answers may be recorded by your assessor).
- Witness statement from customers, colleagues, line managers that provide evidence of how you:
 - o maintain personal health and hygiene,
 - o dealt with customer complaints
 - o deal with customer incidents.

- A personal statement describing how you:
 - o maintain customer care
 - o dealt with customer complaints
 - o deal with customer incidents

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual work environment. Simulation will only be accepted where specified.

U00306: Maintain a safe and secure working environment

Unit Descriptor:

This unit describes the competence required to maintain a safe and secure working environment.

The unit describes the essential abilities of:

- Communicating effectively
- Working in a safe and hygienic manner
- Problem solving
- Meeting legal requirements
- Operating within organizational procedures

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

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|----|--------------------------------------|-----|---|
| 1. | Maintain personal health and hygiene | 1.1 | Clean, smart and appropriate clothing, footwear and headgear are worn. |
| | | 1.2 | Hair is neat and tidy and worn in accordance with organizational requirements. |
| | | 1.3 | Jewellery, perfume and cosmetics are worn in line with organizational requirements. |
| | | 1.4 | Cuts, grazes and wounds are correctly treated by the appropriate person. |
| | | 1.5 | Illness and infections are reported promptly to the appropriate person. |
| | | 1.6 | All work is carried out in an efficient manner in line with appropriate organizational procedures and legal requirements. |

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| 2. | Carry out procedures in the event of a fire | 2.1 | In the event of a fire, the alarm is raised immediately. |
| | | 2.2 | Fire fighting equipment is correctly used in accordance with manufacturer's instructions and organisation's procedures. |
| | | 2.3 | All safety and emergency signs and notices are adhered to. |
| | | 2.4 | Correct evacuation procedures are followed in a calm, orderly manner and in accordance with organizational procedures. |
| | | 2.5 | Designed assembly points are reached and registration done. |
| | | 2.6 | Unexpected situations are dealt with effectively and the appropriate person(s) where necessary. |
| | | 2.7 | All work is carried out in an organised and efficient manner in accordance with safety and health regulations and organisational procedures. |
| 3. | Handle the discovery of suspicious items/packages | 3.1 | Suspicious items and packages are left untouched. |
| | | 3.2 | Suspicious items and packages are reported in accordance with organizational procedures. |
| | | 3.3 | Correct safety and security procedures are followed in a calm and accordance with organizational procedures. |
| | | 3.4 | Unexpected situations are dealt with effectively and the appropriate person(s) where necessary. |
| | | 3.5 | All work is carried out in an organised and efficient manner in accordance with safety and health regulations and organisational procedures. |

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| 4. | Carry out procedures in the event of an accident | 4.1 | In the event of an accident, basic first aid is performed following recommended procedures. |
| | | 4.2 | Assistance from the appropriate person responsible for first aid is sought immediately. |
| | | 4.3 | Emergency services are contacted in accordance with organizational procedures |
| | | 4.4 | Appropriate action is taken to ensure safety of injured and uninjured persons. |
| | | 4.5 | Comfort and reassurance is given to injured persons. |
| | | 4.6 | Accidents are reported and documented in accordance with organisational procedures. |
| | | 4.7 | Unexpected situations are dealt with effectively and the appropriate person(s) are informed where necessary. |
| | | 4.8 | All work is carried out in an organised and efficient manner in accordance with safety and health regulations and organisational procedures |
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| 5. | Maintain a safe work environment for customers, staff and visitors | 5.1 | Hazard and potential hazards to the safety of customers, staff and visitors are promptly identified and rectified. |
| | | 5.2 | Customers, staff and visitors are made aware of all hazards and potential hazards in accordance with organizational procedures. |

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| | 5.3 | Cautionary measures are taken to warn customers, staff and visitors of hazards and potential hazards. |
| | 5.4 | Accidents, damage and non-rectifiable hazards are reported promptly to the appropriate person. |
| | 5.5 | Unexpected situations are dealt with effectively and the appropriate person(s) are informed where necessary. |
| | 5.6 | All work is carried out in an organized and efficient manner in accordance with safety and health regulations and organizational procedures. |
| 6. | | Maintain a secure work environment for customers, staff and visitors |
| | 6.1 | Potential security risks are identified and reported to the appropriate person in line with organizational procedures. |
| | 6.2 | Customer and staff areas are correctly secured against unauthorised access. |
| | 6.3 | All establishment storage and security facilities are secured against unauthorized access. |
| | 6.4 | Establishment, staff or customer lost property is promptly reported to the appropriate person. |
| | 6.5 | Suspicious individuals are politely challenged or reported promptly to the appropriate person. |
| | 6.6 | Unexpected situations are dealt with efficiently and the appropriate person(s) are informed where necessary. |
| | 6.7 | All work is carried out in an organized and efficient manner in line with appropriate organizational procedures and legal requirements. |

RANGE STATEMENT

You must cover the items below:

Element 1: Maintain personal health and hygiene

A. Regulations:

- (i) current relevant legislation relating to safe and hygienic working practices

Element 2: Carry out procedures in the event of a fire

B. Fire:

- (i) All types

C. Fire fighting equipment:

- (i) fire hose
- (ii) fire blanket
- (iii) foam extinguisher
- (iv) powder extinguisher
- (v) water extinguisher
- (vi) carbon dioxide extinguisher
- (vii) sand
- (viii) wet blanket

D. Regulations: *(Also applies to element 3)*

- (i) legislation
- (ii) manufacturer
- (iii) supplier

Element 3: Handle the discovery of suspicious items/packages

E. Suspicious items and packages:

- (i) all unattended bags, packages and parcels
- (ii) unusual and unaccounted for deliveries

Element 4: Carry out procedures in the event of an accident

F. Accidents:

- (i) all accidents involving injury

G. Basic first aid application:

- (i) bandaging
- (ii) cold pack
- (iii) Heimlich manoeuvre

H. Appropriate action:

- (i) removing and lifting injured person
- (ii) rendering basic first aid

I. Responsible person:

- (i) company nurse
- (ii) safety officer

Element 5: Maintain a safe work environment for customers, staff and visitors

J. Hazards and potential hazards:

- (i) areas and incidents which threatens the safety of customers, staff and visitors
- (ii) suspicious items

K. Accidents:

- (i) all accidents involving injury to customer, staff and visitors
- (ii) rendering basic first aid

L. Regulations:

- (i) current relevant legislation relating to safe and hygienic working practices when maintaining a safe environment for customers, staff and visitors
- (ii) manufacturer
- (iii) supplier

Element 6: Maintain a secure work environment for customers, staff and visitors

M. Security risks:

- (i) prohibited areas
- (ii) suspicious items
- (iii) unauthorized entrances/exits
- (iv) missing keys

N. Customer and staff area:

- (i) public facilities
- (ii) public areas
- (iii) work areas
- (iv) staff facilities

O. Storage facilities:

- (i) storerooms
- (ii) safes
- (iii) cash boxes

P. Legal requirements:

- (i) Current relevant legislation relating to safe and hygienic working practices when maintaining a secure environment for customers, staff and visitors

UNDERPINNING KNOWLEDGE AND SKILLS**Health and Safety**

1. Why it is important to comply with health and safety regulations.
2. Where and from whom information on current health and safety regulations can be obtained.
3. What the possible causes are of fire in the working environment.
4. What preventative actions can be taken to minimize risk of fire.
5. What organizational procedures should be followed in the event of fire.
6. Where alarms are located and how to activate them.
7. Why a fire should never be approached unless it is safe to do so.
8. Why it is important to comply with health and safety legislation.
9. Why suspicious items and packages should be left untouched.
10. Why suspicious items and packages should be reported.
11. What basic first aid should be applied in the event of an accident.
12. Who is the person responsible for first aid.
13. What emergency services are available in the event of an accident and why it is important to contact them.
14. What action should be taken to ensure the safety of the injured and uninjured.
15. What are the organisational procedures for reporting an accident.
16. What cautionary measures can be taken to warn customers, staff and visitors of potential hazards.
17. What the potential hazards are within own working environment.
18. Why suspicious items and packages must not be approached or tampered with.
19. Where first aid equipment and the accident register are located.
20. Why it is important to use correct lifting techniques.
21. Why it is important to comply with health and safety regulations.
22. Where and from whom information on current health and safety legislation can be obtained.

23. What the employee's responsibility is in relation to health and safety regulations.
24. Which keys, property and areas should be secured from unauthorized access at all times.
25. Why it is essential to be aware of potential security risks.
26. Why procedures relating to lost property must be adhered to.
27. Why it is important to comply with health and safety regulations.

Hygiene

28. What general hygiene practices must be adhered to in own work environment.
29. Why correct clothing, footwear and headgear should be worn at all times.
30. Why and to whom illness and infections should be reported.
31. Why it is important to maintain good personal hygiene.

Communication

32. Where and from whom information on current safety and health regulations can be obtained.
33. Why only disclosable information should be given to customers.
34. Why it is important to report all unusual/non-routine incidents to the appropriate person.

EVIDENCE GUIDE**(1) Critical Aspects of Evidence**

You must provide evidence that shows have met the performance criteria over a sufficient period of time for your assessor to consider that you are competent.

- Totally through performance evidence in the form of observation or
- Performance evidence in the form of observation to cover **performance criteria 1.1 – 1.3.**
- Totally by role-play and/or questioning to cover all the **performance criteria 2.1 – 2.7** and ranges **B, C** and **D.**
- By observation or by role-play and/or questioning to cover all of the **performance criteria 3.1 – 3.5** and ranges **D** and **E.**
- By observation or through role-play and/or questioning to cover all the performance criteria **4.1 – 4.7** and all the range **F, G, H** and **I.**
- By performance evidence in the form if observation to cover **performance criteria 6.2** and **6.3** and a minimum of **2** items from the range of **M**, **2** items from the range of **N** and **2** items from the range of **O.**
- Supplementary evidence in the form of questioning and/or role-play and/or witness testimony to cover the rest of the performance criteria and all the range.
- Evidence to cover underpinning knowledge must be assessed using questioning which may be oral, written or using visual aids.

(2) Methods of Assessment

- Observation reports by assessor of how you:
 - o maintain personal health and hygiene.
 - o carry out procedures in the event of a fire e.g: observing you taking responsibility for the evacuation
 - o deal with the discovery of suspicious items/packages
 - o carry out procedures in the event of an accident
 - o maintain a safe environment in the workplace
 - o maintain a secure environment in the workplace

- Copies of written communication to and from customers
- Photographs of yourself at work
- Entries made by you in the organisation's accident book.
- Answers to oral or written questions from your assessor (these questions and answers may be recorded by your assessor).
- Witness statements from customers, colleagues and line managers that provide evidence of how you:
 - o maintain personal health and hygiene.
 - o carry out procedures in the event of a fire e.g: observing you taking responsibility for the evacuation
 - o deal with the discovery of suspicious items/packages
- Witness testimony from persons who have seen you carry out procedures when an accident has occurred.
- Witness testimony from your manager or the person responsible for health and safety and security in the organisation describing and confirming your role in:
 - o monitoring and maintaining a safe working environment
- A case history report produced by you, giving details of a particular occasion when you contributed to maintaining a safe work environment.

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual work environment. Simulation will only be accepted where specified.

U00501: Process information

Unit Descriptor:

This unit describes the competence required to ensure the efficient and effective processing of information.

The unit describes the essential abilities of:

- Communicating effectively
- Problem solving
- Responding to customer needs
- Keeping records
- Operating with organisational procedures
- Meeting legal requirements

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

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|----|--|-----|--|
| 1. | Process incoming and outgoing telecommunications | 1.1 | Communications are responded to promptly and clearly using approved organizational procedures. |
| | | 1.2 | Callers are correctly identified and requirements determined accurately. |
| | | 1.3 | Queries are answered within own area of authority or referred to the appropriate person. |
| | | 1.4 | Outgoing calls are correctly obtained. |
| | | 1.5 | Relevant information is courteously obtained and checked. |
| | | 1.6 | Relevant information is communicated promptly and accurately to the appropriate person. |

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2. Supply information to meet specified requests
- 1.7 Faults are promptly reported to the appropriate person.
 - 1.8 Recording of communications, when required, is in accordance with organizational procedures.
 - 1.9 Unexpected situations are dealt with effectively and the appropriate persons are informed where necessary.
 - 1.10 All work is prioritized and carried out in an organized and efficient manner in accordance with safety and hygiene regulations and organizational procedures.
 - 2.1 Relevant sources of information are correctly identified.
 - 2.2 Appropriate information is obtained and collated.
 - 2.3 Information is supplied to the appropriate person within required deadlines.
 - 2.4 Information is supplied in a form appropriate to the urgency and requirement of the request.
 - 2.5 Help is sought from the appropriate person when difficulties occur in obtaining information.
 - 2.6 Difficulties in achieving targets are promptly reported and politely explained.
 - 2.7 Unexpected situations are dealt with effectively and the appropriate person(s) informed where necessary.

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| 3. | Check and process routine numerical information | 2.8 | All work is prioritized and carried out in an organised and efficient manner in accordance with safety and hygiene regulations and organisational procedures. |
| | | 3.1 | Numerical information is checked accurately. |
| | | 3.2 | Inconsistencies are promptly reported to the appropriate person(s). |
| | | 3.3 | The recording and processing of checked, numerical information is carried out as instructed. |
| | | 3.4 | Unexpected situations are dealt with effectively and the appropriate person(s) informed where necessary. |
| | | 3.5 | All work is prioritized and carried out in an organized and efficient manner in accordance with legal requirements and organisational procedures. |

RANGE STATEMENT

You must cover the items below:

Element 1: Process incoming and outgoing telecommunications

A. Communications:

- (i) internal
- (ii) external

B. Telecommunications:

- (i) voice
- (ii) data (e.g. e-mail)
- (iii) text (e.g. pager, text messaging)

C. Unexpected situations:

- (i) customer complaints
- (ii) difficult customers
- (iii) equipment faults

Element 2: Supply information to meet specified requests

D. Information sources:

- (i) from within the organization
- (ii) from external sources
- (iii) own notes

E. Information supplied for:

- (i) requests from within the organization
- (ii) requests from approved persons or external to the organisation

F. Unexpected situations

- (i) difficulty with obtaining information
- (ii) customer complaints

G. Regulations

- (i) legislation
- (ii) manufacturer
- (iii) supplier

Element 3: Check and process routine numerical information

H. Inconsistencies:

- (i) checking accuracy
- (ii) cross-checking against existing records

I. Unexpected Situations:

- (i) inconsistent information
- (ii) insufficient information

J. Legal Requirements:

- (i) current relevant legislation and relating to processing numerical information and safe work practices when processing numerical information

UNDERPINNING KNOWLEDGE AND SKILLS**Health and Safety**

1. What the policies and procedures on security, safety and emergencies are.

Product Knowledge

2. What the structure, product and services of the organization are.
3. What the different types and uses of telecommunications equipment are.

Communication

4. What the confirmation procedures are.
5. How to establish a rapport and goodwill with callers.
6. What the communication styles used by the organizations are.
7. What the most effective and efficient forms of communication are.
8. How to compose notes, letters and memoranda accurately and effectively.
9. How to use language effectively.
10. How to present information pictorially, graphically and in text.
11. When information should be presented pictorially, graphically and in text.

Customer care

12. Why it is important to communicate effectively and efficiently.
13. Why it is important to establish a rapport and goodwill with callers.

Documentation

14. How to listen, interpret, extract and record information.
15. How to compose messages accurately and effectively.

Administration

16. Where information is located.
17. Why it is important to interpret information and instructions correctly.
18. Why it is useful to use reference material.
19. Where to find reference material and use it correctly.
20. What the data protection and copyright policies are.
21. Why it is important to be aware of copyright and data protection.
22. How to add, subtract multiply and divide numbers.
23. How to check figures against other sources of information.
24. How to confirm figures are accurate.
25. What the procedures are for forwarding checked items.
26. What the reporting procedures are for inconsistencies.

Organisational Procedures

27. What the security and confidentiality policies of the organizations are.
28. What the organization's service standards and codes of practice are.

EVIDENCE GUIDE

(1) Critical Aspects of Evidence

- Totally through performance evidence in the form of observation or
- By performance evidence in the form of observation to cover **performance criteria 1.1-1.6** and a minimum of **all** from the range of **A** to include routine and non-routine communications and **two** (2) from the range of **B**.
- To include the effective use of telecommunication, receiving and communicating information by telephone, computer or fax for your own purposes and on behalf of others.
- Totally through performance evidence in the form of observation and products of work, if appropriate or
- By performance evidence in the form of observation to cover **performance criteria 2.1- 2.4** and a minimum of **two** (2) from the range of **D** and **one** (1) from the range of **E**.
- The different types of information referred to in the performance criteria should include meeting requests for information by finding suitable sources and supplying the information in an acceptable and appropriate way. They should also include reference to information in the form of:
 - letters, memoranda, notes, verbal responses
- By performance evidence in the form of observation to cover **performance criteria 3.1-3.3** and a minimum of two (2) from the range of H to include quotes, receipts, bills and invoices

(2) Methods of Assessment

- Observation reports by your assessor of how you:
 - o process incoming and outgoing telecommunications
 - o supply information to meet specified requests
 - o check and process routine numerical information
- Copies of written communication to and from customers in response to information requested.
- Answers to oral or written questions from your assessor.
- Witness statements from customers, colleagues, line managers that provide evidence of how you:
 - o process incoming and outgoing telecommunications
 - o supply information to meet specified requests
 - o check and process routine numerical information.
- A personal statement describing how you:
 - o process incoming and outgoing telecommunications
 - o supply information to meet specified requests
 - o check and process routine numerical information.

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual work environment. Simulation will only be accepted where specified.

U00601: Welcome, screen and assist guests and visitors

Unit Descriptor:

This unit describes the competence required to ensure the efficient welcoming, screening and assisting of guests and visitors.

This unit describes the essential abilities of:

- Responding to customer needs
- Communicating effectively
- Problem solving
- Working in a safe and hygiene manner
- Operating within organisational procedures
- Meeting legal requirements

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

- | | | | |
|----|------------------------------------|-----|--|
| 1. | Meet and greet guests and visitors | 1.1 | Guests and visitors are greeted promptly and politely on arrival and nature of visit established. |
| | | 1.2 | Salutation is in accordance with organisational procedures. |
| | | 1.3 | Known guests and visitors are acknowledged by name in an appropriate and cordial manner. |
| | | 1.4 | Conversations with guests and visitors are conducted in a manner that promotes goodwill and trust. |
| | | 1.5 | Situations within the scope of authority are dealt with appropriately. |

- 1.6 Guests and visitors are directed to the appropriate personnel or department.
 - 1.7 Unexpected situations are dealt with effectively and the appropriate persons are informed where necessary.
 - 1.8 All work is prioritized and carried out in an organized and efficient manner in accordance with safety and hygiene regulations and organisational procedures.
2. Screen and assist guests and visitors
- 2.1 Guests and visitors are received courteously and nature of visit ascertained following appropriate procedures.
 - 2.2 Guests and visitors whose requirements are within the scope of authority, are dealt with promptly and appropriately.
 - 2.3 Where assistance required is beyond the scope of authority, guests and visitors are directed to the appropriate personnel or department.
 - 2.4 Security and confidentiality procedures are consistently followed.
 - 2.5 Undesirables are identified and dealt with in accordance with organisational procedures.
 - 2.6 Unexpected situations are dealt with effectively and the appropriate person(s) are informed where necessary.
 - 2.7 All work is prioritized and carried out in an organized and efficient manner in accordance with safety and hygiene regulations and organisational procedures.

RANGE STATEMENT

You must cover the items below

Element 1: Meeting and greeting guests and visitors

A. Guests/visitors: *(Also applies to element 2)*

- (i) adults
- (ii) children
- (iii) guests with disabilities (mobility, visual, speech, hearing)
- (iv) unexpected guests
- (v) regular guests
- (vi) large parties
- (vii) VIPs
- (viii) locals

B. Salutations:

- (i) appropriate for known and unknown guests/visitors
- (ii) VIPs and non-VIPs

C. Unexpected situations:

- (i) the arrival of undesirables
- (ii) mistaken identity

D. Conversation:

- (i) responding to queries
- (ii) informing

E. Regulations: *(Also applies to element 2)*

- (i) legislation
- (ii) manufacturer
- (iii) supplier

Element 2: Meet and greet guests and visitors

F. Undesirables:

- (i) persons demonstrating disruptive behaviour
- (ii) persons who pose danger to the safety of the organization staff and other guests

UNDERPINNING KNOWLEDGE AND SKILLS

Organisational Procedures

1. What the organization's service standards and codes of practice are.
2. What the organizational security and confidentiality procedures are.

Communication

3. What are the formal and informal communication routes.
4. Why effective spoken communication is essential when meeting and greeting guests/visitors.

Product Knowledge

5. What the main reception activities are.

Job Role

6. What your role and responsibilities are.

Working Practices

7. What are the main roles and responsibilities for screening and who is responsible for them.

EVIDENCE GUIDE**(1) Critical Aspects of Evidence**

- Totally through performance evidence in the form of observation or
- By performance evidence in the form of observation to cover **performance criteria 1.1 – 1.6** and a minimum of four (4) from the range of **A** and both from the range of **D**.
- Totally through performance evidence in the form of observation.
- Performance evidence in the form of observation to cover **performance criteria 2.1 – 2.4** and a minimum of four (4) from the range of **A** and
- By supplementary evidence in the form of questioning and/or role-play and/or witness testimony to cover the rest of the performance criteria and range.
- Evidence to cover underpinning knowledge must be assessed using questioning which may be oral, written or using visual aids.

(2) Methods of Assessment

- Observation reports by your assessor of how you:
 - o meet and greet guests and visitors.
 - o screen and assist guests and visitors.
- Answers to oral or written questions from your assessor (these questions and answers may be recorded by your assessor).
- Witness statement from customers, colleagues, line managers that provide evidence of how you screen and assist guests and visitors:
 - o meet and greet guests and visitors
 - o screen and assist guests and visitors
- A personal statement describing how you:
 - o meet and greet guests and visitors
 - o screen and assist guests and visitors

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual work environment. Simulation will only be accepted where specified.

U00406: Maintain payment point and handle cash and non-cash payment

Unit Descriptor:

This unit describes the competence required to maintain payment point and handle cash and non-cash payments.

The unit describes the essential abilities of

- Communicating effectively
- Responding to customer needs
- Problem solving
- Keeping records
- Operating within organisational procedures
- Meeting legal requirements

ELEMENT

PERFORMANCE CRITERIA

To be competent you must achieve the following:

1.	Maintain payment point for cash and non-cash payments	1.1	All customers are dealt with in a polite and helpful manner at all times.
		1.2	All equipment and relevant materials required in the payment point are available and ready for use.
		1.3	Payment point is maintained during service and replenished with relevant materials at the appropriate time.
		1.4	Payment point contents are made available for authorized collection during service.
		1.5	Customers are informed politely and promptly of any delays where appropriate.

2. Handle cash and non-cash payments
- 1.6 The payment point is closed down in accordance with appropriate organisational procedures.
 - 1.7 Unexpected situations are dealt with effectively and the appropriate person(s) informed where necessary.
 - 1.8 All work is carried out in an organised and efficient manner in accordance with safety and health regulations and organisational procedures.
- 2.1 Customers are dealt with in a polite and helpful manner at all times.
- 2.2 All relevant information is entered into the payment point correctly.
- 2.3 The customer is informed of the payment amount.
- 2.4 Receipt of payment is acknowledged and validated where necessary.
- 2.5 Non-cash payments are accepted, validated, completed accurately and authorized in accordance with organisational procedures.
- 2.6 Cash payments are accurately transacted and in accordance with statutory regulations.
- 2.7 Payment documents are stored in a secure, approved location in accordance with organisational procedures.
- 2.8 The transaction is carried out in the optimum time and the relevant confirmation is given to the customer.

- 2.9 Unexpected situations are dealt with effectively and the appropriate person(s) informed where necessary.
- 2.10 All work is carried out in an organised and efficient manner in accordance with safety and health regulations and organisational procedures.

RANGE STATEMENT

You must cover the items below:

Element 1: Maintain payment point for cash and non-cash payments

A. Payment point:

- (i) computerised
- (ii) electronic
- (iii) manual

B. Relevant materials:

- (i) cash
- (ii) non-cash items
- (iii) relevant stationery

C. Unexpected situations:

- (i) discrepancy in payment
- (ii) discrepancy in change
- (iii) suspected fraud
- (iv) breach of security

D. Regulations:

- (i) legislation
- (ii) manufacturers
- (iii) suppliers
- (iv) organisational

Element 2: Handle cash and non-cash payments

E. Payments:

- (i) cash
- (ii) cheques
- (iii) credit cards
- (iv) debit cards
- (v) cash equivalents
- (vi) charge cards

F. Relevant confirmation:

- (i) receipt
- (ii) bill
- (iii) tokens/vouchers

G. Unexpected situations:

- (i) discrepancy in payment
- (ii) discrepancy in change
- (iii) suspected fraud

H. Regulations:

- (i) statutory
- (ii) organisational

UNDERPINNING KNOWLEDGE AND SKILLS**Health and Safety**

1. What security procedures are applicable to the operation of a payment point

Communication

2. What the consequences are of unreported errors when maintaining a payment point.

Organisational Procedures

3. What appropriate organizational procedures must be adhered to when maintaining a payment point.

Working Practices

4. What the appropriate organizational procedures are regarding the handling of payments.
5. Why it is important to know the procedures to follow when dealing with errors in handling cash and non-cash payments.

EVIDENCE GUIDE**(1) Critical Aspects of Evidence**

- Totally by performance evidence in the form of observation or
- By performance evidence in the form of observation to cover **performance criteria 1.1, 1.2, 1.3, 1.4 and 1.6** and a minimum of **one (1)** item from the range of **A**, **two (2)** items from the range of **B**.
- By performance evidence in the form of observation to cover **performance criteria 2.1- 2.6 and 2.8** and a minimum of **two (2)** items from the range of **E**, (All methods of payment used by organization), one (1) item from the range of **F**.
- By supplementary evidence in the form of questioning and /or role-play and/or witness testimony to cover the rest of the performance criteria and range.
- Evidence should cover at least **one** of the following types of payment point: **computerized, electronic, manual**
- Evidence of relevant stationery should include coverage of: receipt rolls, bills, note-pad, writing material, audit rolls
- Evidence to cover underpinning knowledge must be assessed using questioning which may be oral, written or using visual aids.

(2) Methods of Assessment

- Observation reports by assessors of how you:
 - o maintain payment point for cash and non-cash payments
 - o handle cash and non-cash payments
- Copies of written communication to and from customers.
- Answers to oral or written questions from your assessor (these questions and answers may be recorded by your assessor).
- Witness statements from customers, colleagues, line managers that provide evidence of how you:
 - o maintain payment point and handle cash and non-cash payments
 - o handle cash and non-cash payments
- A personal statement describing how you:
 - o maintain payment point and handle cash and non-cash payments
 - o handle cash and non-cash payments

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual work environment. Simulation will only be accepted where specified.

U00701: Operate and take care of equipment

Unit Descriptor:

This unit describes the competence required to ensure the operating and caring of equipment.

The unit describes the essential abilities of

- Communicating effectively
- Operating equipment following manufacturer's procedures
- Problem solving
- Operating within organisational procedures
- Meeting legal requirements

ELEMENT

PERFORMANCE CRITERIA

To be competent you must achieve the following:

- | | | | |
|----|---|-----|---|
| 1. | Follow instructions and operate equipment | 1.1 | Tasks instructions are understood before operating equipment. |
| | | 1.2 | Operating procedures and techniques follow operating instructions. |
| | | 1.3 | Procedures for dealing with problems in operating equipment are followed correctly. |
| | | 1.4 | Unexpected situations are dealt with effectively and the appropriate persons are informed where necessary. |
| | | 1.5 | All work is prioritized and carried out in an organized and efficient manner in accordance with safety and hygiene regulations and organisational procedures. |

2. Keep equipment in a clean and working condition
 - 2.1 Cleaning of equipment and replacement of consumable items follow instructions.
 - 2.2 Safeguards taken are appropriate to the cleaning or replacement activity.
 - 2.3 Discarded items are disposed of safely and appropriately.
 - 2.4 The equipment and nearby work area are left in a clean and tidy condition.
 - 2.5 Identified equipment faults and risks are promptly and accurately reported to the appropriate person.
 - 2.6 Unexpected situations are dealt with effectively and the appropriate persons are informed where necessary.
 - 2.7 All work is prioritized and carried out in an organized and efficient manner in accordance with safety and hygiene regulations and organisational procedures.

RANGE STATEMENT

You must cover the items below

Element 1: Follow instructions and operate equipment

A. Equipment:

- (i) reprographic
- (ii) data and text processing
- (iii) data and text transmission
- (iv) PBX switchboard

B. Operating instructions:

- (i) those provided by the organisation to ensure compliance with manufacturers' recommendations
- (ii) legal requirements and good working practices

C. Unexpected situations:

- (i) problems with mail
- (ii) customer complaints

Element 2: Keep equipment in a clean and working condition

D. Instructions:

- (i) those issued by the organisation
- (ii) directions from supervisors

E. Methods of taking care of equipment:

- (i) cleaning equipment after instruction
- (ii) replacing consumable items after instruction

F. Unexpected situations:

- (i) equipment faults
- (ii) unavailability of consumables

G. Regulations:

- (i) legislation
- (ii) manufacturer
- (iii) supplier

UNDERPINNING KNOWLEDGE AND SKILLS**Health and Safety**

1. Why is it important to ensure the security of equipment.
2. What the security procedures for equipment are.
3. What the accepted practices for operating equipment are.
4. What precautions should be taken to protect personnel and the working environment.
5. Why is it important to use protective clothing items
6. What the correct procedures for disposing of waste items are.

Product Knowledge

7. Why confidentiality of material produced by equipment should be maintained.
8. Why material produced by equipment should be treated confidentially.
9. What are the correct procedures for cleaning equipment are.
10. What the correct procedures for replacing/replenishing consumable items are.
11. What safeguards should be taken when cleaning/replenishing equipment.
12. Where to find routine user and maintenance instructions.

Legislation

13. What the relevant legal requirements are.
14. What the relevant legal considerations are.
15. What the relevant legal requirements relating to keeping equipment in a clean and working condition are.

Administration

16. Where to find operating instructions.
17. Where to seek clarification of instructions.

Organisational Procedures

18. What the correct procedures for reporting problems and faults are.
19. What the correct procedures for obtaining consumable items are.

EVIDENCE GUIDE**(1) Critical Aspects of Evidence**

- Totally through performance evidence in the form of observation or
- By performance evidence in the form of observation to cover **performance criteria 1.2 and 1.3** and a minimum of: 3 from the range of A and 1 from the range of B
- By performance evidence in the form of observation to cover **performance criteria 2.1 – 2.4** and a minimum of: 1 from the range of D and all from the range of E. Evidence should cover reprographic, data and text processing and text transmission equipment.
- Supplementary evidence in the form of questioning and/or role-play and/or witness testimony to cover the rest of the performance criteria and range.
- Evidence to cover underpinning knowledge must be assessed using questioning, which may be oral, written or using visual aids.

(2) Methods of Assessment

- Observation reports by assessors of how you:
 - o follow instructions and operate equipment.
 - o keep equipment in a clean and working condition
- Answers to oral or written questions from your assessor (these questions and answers may be recorded by your assessor).
- Witness statements from customers, colleagues, line managers that provide evidence of how you:
 - o follow instructions and operate equipment.
 - o keep equipment in a clean and working condition
- A personal statement describing how you:
 - o follow instructions and operate equipment.
 - o keep equipment in a clean and working condition

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual work environment. Simulation will only be accepted where specified.

U00801: Produce text following instructions

Unit Descriptor:

This unit describes the competence required to produce text following instructions.

The unit describes the essential abilities of:

- Problem solving
- Communicating effectively
- Keeping records
- Operating within organisational procedures
- Meeting legal requirements

ELEMENT**PERFORMANCE CRITERIA**

To be competent you must achieve the following:

1. Produce text using a keyboard

- 1.1 Instructions are understood before producing text.
- 1.2 Text is correctly produced from material provided.
- 1.3 Errors in own text are corrected.
- 1.4 Work is produced to meet the requirement of the workplace.
- 1.5 Produced text is collated as instructed.
- 1.6 Text and materials provided are kept as instructed.
- 1.7 Unexpected situations are dealt with effectively and the appropriate persons are informed where necessary.

2. Produce copies using reprographic equipment
- 1.8 All work is prioritized and carried out in an organized and efficient manner in accordance with safety and hygiene regulations and organisational procedures.
 - 2.1 Produced copies are of the required quantity and quality.
 - 2.2 Wastage of materials is minimized.
 - 2.3 Copies are collated as instructed.
 - 2.4 Document pages are neatly and securely fastened when required.
 - 2.5 Copies and original documents are distributed according to instructions.
 - 2.6 Difficulties in achieving targets are promptly reported and the reasons politely explained.
 - 2.7 Procedures for dealing with problems in operating equipment are followed correctly.
 - 2.8 Confidentiality of documents is maintained.
 - 2.9 Unexpected situations are dealt with effectively and the appropriate persons are informed where necessary.
 - 2.10 All work is prioritized and carried out in an organized and efficient manner in accordance with safety and hygiene regulations and organisational procedures.

RANGE STATEMENT

You must cover the items below:

Element 1: Produce text using a keyboard

A. Text:

- (i) numbers
- (ii) words

B. Methods of checking work:

- (i) proof-reading
- (ii) consultation with supervisor

C. Keyboard:

- (i) any type of keyboard used by the candidate in the workplace

D. Unexpected situations: *(Also applies to element 2)*

- (i) equipment faults
- (ii) dissatisfied customer

E. Regulations: *(Also applies to element 2)*

- (i) legislation
- (ii) manufacturer
- (iii) supplier

Element 2: Product copies using reprographic equipment

F. Copies:

- (i) single-page
- (ii) multi-page
- (iii) enlarged
- (iv) reduced
- (v) single-sided
- (vi) double-sided

UNDERPINNING KNOWLEDGE AND SKILLS**Administration**

1. What the layout of the keyboard is and how it operates.
2. What the main keyboard techniques are.
3. What techniques can be used to correct errors.
4. How to save information.
5. Why it is important to save information.
6. What the different methods of collating information are.
7. What the appropriate methods to layout work are.

Documentation

8. What the main sources of information are and how to use them.
9. How and when to use dictionaries/reference materials/glossaries.

Organisational Policies and Procedures

10. What the organization's security and confidentiality procedures are.
11. What the organizational procedures for reporting problems in operating equipment are.
12. What the organizational procedures relating to the use of reprographic equipment are.

Product Knowledge

13. How to produce pages in sequence.
14. Why it is important to have pages in sequence.
15. What the different fastening methods are.
16. How to minimize wastage of materials.

EVIDENCE GUIDE

(1) Critical Aspects of Evidence

- Totally through performance evidence in the form of observation or
- By performance evidence in the form of observation to cover **performance criteria 1.2, 1.4, 1.5, 1.6** and a minimum of **All** from the range of A, one (1) from the range of B, one (1) from the range of C and
- By performance evidence in the form of observation to cover **performance criteria 2.1, 2.3, 2.4, 2.5** and a minimum of **All** from the range of F and
- Supplementary evidence in the form of questioning and/or role-play and/or witness testimony to cover the rest of the performance criteria and range.
- Evidence to cover underpinning knowledge must be assessed using questioning which may be oral, written or using visual aids.

(2) Methods of Assessment

- Observation reports by assessors of how:
 - o you produce text using a keyboard.
 - o produce copies using reprographic equipment.
- Copies of text produced.
- Copies of work produced.
- Answers to oral or written questions from your assessor.
- Witness statements from customers, colleagues, line managers that provide evidence of how you:
 - o you produce text using a keyboard.
 - o produce copies using reprographic equipment.
- A personal statement describing how you:
 - o you produce text using a keyboard.
 - o produce copies using reprographic equipment.

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual work environment. Simulation will only be accepted where specified.

U00901: Store and retrieve information using an established storage system

Unit Descriptor:

This unit describes the competence required to ensure the efficient storage and retrieval of information using an established storage system.

The unit describes the essential abilities of:

- Communicating effectively
- Correct usage of equipment
- Problem solving
- keeping records
- Operating within organisational procedures
- Meeting legal requirements

ELEMENT

PERFORMANCE CRITERIA

To be competent you must achieve the following:

- | | | | |
|----|---|-----|--|
| 1. | Store information using an established storage system | 1.1 | Information is stored promptly, in correct location and sequence. |
| | | 1.2 | Stored materials are undamaged, safe and secure. |
| | | 1.3 | Information is classified correctly. |
| | | 14. | Classification queries are referred to the appropriate person. |
| | | 15. | Systems for locating information are up to date, accurate and in a prescribed form. |
| | | 16. | Unexpected situations are dealt with effectively and the appropriate person(s) are informed where necessary. |

17. All work is prioritized and carried out in an organized and efficient manner in accordance with safety and hygiene regulations and organisational procedures.
2. Retrieve information using an established storage system
 - 2.1 Required information is promptly located, obtained and passed to person or location.
 - 2.2 Delays in the supply of information are notified and reasons for delay politely explained.
 - 2.3 Information retrieved is correctly recorded, up to date and in the required form.
 - 2.4 Missing or overdue items are identified and correct procedures followed to locate them.
 - 2.5 Unexpected situations are dealt with effectively and the appropriate persons are informed where necessary.
 - 2.6 All work is prioritized and carried out in an organized and efficient manner in accordance with safety and hygiene regulations and organisational procedures.

RANGE STATEMENT

You must cover the items below:

Element 1: Store information using an established storage system**A. Storage systems:**

- (i) hard copy
- (ii) filing cabinet
- (iii) computer
- (iv) card

B. Methods of classifying information: *(Also applies to element 2)*

- (i) alphabetical
- (ii) numerical

C. Unexpected situations: *(Also applies to element 2)*

- (i) storage system faults
- (ii) customer complaints

D. Regulations: *(Also applies to element 2)*

- (i) legislation
- (ii) manufacturer
- (iii) supplier

Element 2: Retrieve information using an established storage system**E. Storage Systems:**

- (i) filing cabinet
- (ii) computer
- (iii) card

UNDERPINNING KNOWLEDGE AND SKILLS**Administration**

1. What the characteristics of effective classification systems are.
2. What different indexing systems exist and when they should be used.
3. What the different methods of storing information are.
4. Why it is important to classify information.
5. Why it is important to store information effectively.
6. How to identify and interpret different classification systems.
7. Why it is important to be able to identify and interpret classification systems.
8. What the different methods of classifying information are.
9. What different indexing and storage systems exist and when they should be used.
10. How booking out and bringing forward systems operate.

Organisational Procedures

11. What the organization's storage systems and practices are including special and confidential information, data protection and copyright.

EVIDENCE GUIDE**(1) Critical Aspects of Evidence**

- Totally through performance evidence in the form of observation or
- By performance evidence in the form of observation to cover **performance criteria 1.1, 1.2, 1.3, 1.5** and a minimum of two (2) from the range of A.
- The evidence should include the candidate following set procedures for entering information into an established storage system. The different types of information in performance criteria 1.1 should include reference to records, reference materials and confidential materials.
- By performance evidence in the form of observation to cover **performance criteria 2.1 – 2.4** and a minimum of two (2) from the range of **E**
- The different types of information in performance criteria 1 should include reference to records, reference materials, and confidential materials.
- Supplementary evidence in the form of questioning and/or role-play and/or witness testimony to cover the rest of the performance criteria and range.
- Evidence to cover underpinning knowledge must be assessed using questioning which may be oral, written or using visual aids.

(2) Methods of Assessment

- Observation reports by your assessor of how you:
 - o store information using an established storage system
 - o retrieve information using an established storage system
- Answers to oral or written questions from your assessor.
- Witness statements from colleagues, line managers that provide evidence of how you:
 - o store information using an established storage system
 - o retrieve information using an established storage system
- A personal statement describing how you:
 - o store information using an established storage system
 - o retrieve information using an established storage system.

(3) Context of Assessment

Assessment of performance requirements in this unit should be undertaken in an actual work environment. Simulation will only be accepted where specified.