UNIT HANDBOOK

Diploma in Medical Administration (5528-22-23)

Level 2, 3 and 4 Unit Handbook for Centres

Sept 2023 Version 5.1

City & Guilds

Qualification at a glance

Subject area	**Business and Administration**
City & Guilds number	5528
Age group approved	16+
Entry requirements	None
Assessment	By Portfolio/Assignment/Evolve
Centre Approval	Available
Support materials	Qualification handbook Assessment packs Text Book Smartscreen
Registration and certification	Consult the Walled Garden/Online Catalogue for last dates

Version and date	Change detail	Section
1.1 February 16	Updated support information for unit 364	Units
2.0 April 2016	Updated the following units: 201 - 210, 212 – 219, 221, 223, 227, 228, 230, 234, 236, 239, 240, 243, 272 , 302 - 309, 314 – 316, 321, 322, 328, 344, 345, 349	Units
2.1 July 2016	Updated support information for unit 270	Units
2.2 October 2016	Appendix added to Unit 362 (all subsequent appendices in the document re-numbered	Units
3.0 February 2017	Unit 209 credits amended (from 6 to 3) Unit 309 credits amended (from 5 to 4)	Units
4.0 May 2017	Unit 209 credits amended (from 3 to 6) Unit 309 credits amended (from 4 to 5)	Units
5.0 May 2017	Supporting information added to Unit 234	Units
5.1 Sept 2023	Unit 364 : Health Aspects 'diabetes' amended to 'type 2 diabetes' and 'obesity' added	Units
5.1 Sept 2023	Typing error corrected for spelling of 'dilation'	Appendix 1
5.1 Sept 2023	Minor typing error amendments	Appendix 3 and Unit 364

Contents

1	Units	6
Unit 101	Health and safety in a business environment	10
Unit 102	Use a telephone and voicemail system	12
Unit 105	Word processing software	14
Unit 106	Presentation software	18
Unit 107	Database software	22
Unit 108	Spreadsheet software	25
Unit 201	Manage diary systems	29
Unit 202	Produce business documents	31
Unit 203	Collate and report data	35
Unit 204	Store and retrieve information	38
Unit 205	Produce minutes of meetings	41
Unit 206	Handle mail	44
Unit 207	Provide reception services	47
Unit 208	Prepare text from notes using touch typing	49
Unit 209	Prepare text from shorthand	52
Unit 210	Prepare text from recorded audio instruction	55
Unit 212	Archive information	58
Unit 213	Maintain and issue stationery and supplies	60
Unit 214	Use and maintain office equipment	63
Unit 215	Contribute to the organisation of an event	65
Unit 216	Organise business travel or accommodation	68
Unit 217	Provide administrative support for meetings	71
Unit 218	Administer human resource records	75
Unit 219	Administer the recruitment and selection process	77
Unit 221	Administer finance	80
Unit 223	Buddy a colleague to develop their skills	82
Unit 227	Employee rights and responsibilities	86
Unit 228	Process information about customers	89
Unit 230	Deliver customer service	92
Unit 234	Spreadsheet software	98
Unit 236	Processing customers' financial transactions	103
Unit 239	Manage personal performance and development	105
Unit 240	Develop working relationships with colleagues	113
Unit 243	Presentation software	119
Unit 265	Medical terminology	125
Appendix 1	Word parts list – Level 2 Medical terminology	127
Appendix 2	Human body systems – Level 2 Medical terminology	134

Appendix 3	Medical specialities – Level 2 Medical terminology	137
Appendix 4	Pharmaceutical abbreviations – Level 2 Medical terminology	139
Unit 266	Administration skills in a medical environment	141
Unit 267	Communication skills in a medical environment	146
Unit 268	Working in the National Health Service	150
Unit 269	Work experience in a medical environment	156
Unit 270	Medical word processing	160
Appendix 5	Abbreviations, spelling, amendment and correction signs, symbols and special characters - Medical word processing	164
Unit 271	Production of medical documents from recorded speech	167
Unit 272	Database software	170
Unit 302	Contribute to the improvement of business performance	172
Unit 303	Negotiate in a business environment	177
Unit 304	Develop a presentation	181
Unit 305	Deliver a presentation	185
Unit 306	Create bespoke business documents	189
Unit 307	Contribute to the development and implementation of an information system	194
Unit 308	Monitor information systems	198
Unit 309	Evaluate the provision of business travel or accommodation	202
Unit 314	Administer legal files	206
Unit 315	Build legal case files	210
Unit 316	Manage legal case files	213
Unit 321	Manage an office facility	216
Unit 322	Analyse and present business data	220
Unit 328	Spreadsheet software	225
Unit 344	Participate in a project	227
Unit 345	Manage personal and professional development	229
Unit 349	Presentation software	234
Unit 360	Medical administration	236
Unit 361	Managing communication in a medical environment	242
Unit 362	Medical word processing	247
Appendix 6	Abbreviations, spelling, amendment and correction signs, symbols and special characters	252
Unit 363	Production of medical documents from recorded speech	256
Unit 364	Medical principles for the administrator	260
Appendix 7	classification of medicines/drugs - Level 3 Medical principles for the administrator	264
Appendix 8	List of bones - Medical principles for the administrator	265

Appendix 9	**List of organs and systems - Medical principles for the administrator**	**266**
Unit 365	**Legal aspects of medical administration**	**268**
Unit 405	**Support environmental sustainability in a business environment**	**272**
Unit 406	**Resolve administrative problems**	**275**
Unit 407	**Prepare specifications for contracts**	**279**
Unit 408	**Manage events**	**282**
Appendix 10	**Sources of general information**	**286**

1 Units

Structure of units

These units each have the following:

- City & Guilds reference number
- Unit Accreditation Number (UAN)
- title
- level
- credit value
- guided learning hours
- unit aim
- learning outcomes which are comprised of a number of assessment criteria

Summary of units

Unit accreditation number	City & Guilds unit number	Unit title	Credit value	Unit Level
D/506/1794	101	Health and safety in a business environment	2	1
K/506/1796	102	Use a telephone and voicemail system	2	1
L/502/4627	105	Word Processing Software	3	1
K/502/4621	106	Presentation Software	3	1
H/502/4553	107	Database software	3	1
A/502/4624	108	Spread sheet Software	3	1
L/506/1807	201	Manage diary systems	2	2
Y/506/1809	202	Produce business documents	3	2
L/506/1810	203	Collate and report data	3	2
R/506/1811	204	Store and retrieve information	4	2
Y/506/1812	205	Produce minutes of meetings	3	2
D/506/1813	206	Handle mail	3	2
H/506/1814	207	Provide reception services	3	2

Unit accreditation number	City & Guilds unit number	Unit title	Credit value	Unit Level
K/506/1815	208	Prepare text from notes using touch typing	4	2
M/506/1816	209	Prepare text from shorthand	6	2
T/506/1817	210	Prepare text from recorded audio instruction	4	2
T/506/1865	212	Archive information	3	2
Y/506/2295	213	Maintain and issue stationery and supplies	3	2
J/506/1868	214	Use and maintain office equipment	2	2
L/506/1869	215	Contribute to the organisation of an event	3	2
D/506/1875	216	Organise business travel or accommodation	4	2
H/506/1876	217	Provide administrative support for meetings	4	2
T/506/1879	218	Administer human resource records	3	2
A/506/1883	219	Administer the recruitment and selection process	3	2
R/506/1890	221	Administer finance	4	2
M/506/1895	223	Buddy a colleague to develop their skills	3	2
L/506/1905	227	Employee rights and responsibilities	2	2
R/506/2134	228	Process information about customers	3	2
A/506/2130	230	Deliver customer service	5	2
F/502/4625	234	Spread sheet Software	4	2
F/601/8320	236	Processing customer's financial transactions	4	2
L/506/1788	239	Manage personal performance and development	4	2
R/506/1789	240	Develop working relationships with colleagues	3	2
M/502/4622	243	Presentation Software	4	2
L/505/1245	265	Medical terminology	6	2
H/505/1249	266	Administration skills in a medical environment	8	2

Unit accreditation number	City & Guilds unit number	Unit title	Credit value	Unit Level
T/505/1255	267	Communication skills in a medical environment	6	2
D/505/1248	268	Working in the National Health Service	9	2
A/505/1256	269	Work experience in a medical environment	5	2
J/505/1258	270	Medical word processing	9	2
L/505/1259	271	Production of medical documents from recorded speech	6	2
M/502/4555	272	Database Software	4	2
D/506/1911	302	Contribute to the improvement of business performance	6	3
H/506/1912	303	Negotiate in a business environment	4	3
K/506/1913	304	Develop a presentation	3	3
M/506/1914	305	Deliver a presentation	3	3
T/506/1915	306	Create bespoke business documents	4	3
A/506/1916	307	Contribute to the development and implementation of an information system	6	3
F/506/1917	308	Monitor information systems	8	3
J/506/1935	309	Evaluate the provision of business travel or accommodation	5	3
L/506/1936	314	Administer legal files	5	3
Y/506/1938	315	Build legal case files	5	3
K/506/1944	316	Manage legal case files	5	3
M/506/1945	321	Manage an office facility	4	3
M/506/1945	322	Analyse and present business data	6	3
J/502/4626	328	Spread sheet Software	6	3
F/506/1934	344	Participate in a project	3	3
T/506/2952	345	Manage personal and professional development	3	3

Unit accreditation number	City & Guilds unit number	Unit title	Credit value	Unit Level
T/502/4623	349	Presentation Software	6	3
R/505/1263	360	Medical administration	8	3
Y/505/1264	361	Managing communication in a medical environment	7	3
H/505/1266	362	Medical word processing	9	3
K/505/1267	363	Production of medical documents from recorded speech	9	3
M/505/1268	364	Medical principles for the administrator	9	3
K/505/1270	365	Legal aspects of medical administration	9	3
D/506/1956	405	Support environmental sustainability in a business environment	4	4
H/506/1957	406	Resolve administrative problems	6	4
M/506/1959	407	Prepare specifications for contracts	4	4
J/506/1935	408	Manage events	6	4

Unit 101 Health and safety in a business environment

UAN:	**D/506/1794**
Level:	1
Credit value:	2
GLH:	10
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAE141 Use occupational and safety guidelines when using a workstation.
Aim:	This unit aims to develop the knowledge and skills needed to cover health and safety in a business environment. Upon completion of this unit, learners will understand their health and safety responsibilities and will know how to work in a safe way in a business environment. Learners will also be able to comply with health and safety requirements in a business environment.

Learning outcome
The learner will: 1. Understand health and safety responsibilities in a business environment.
Assessment criteria
The learner can: 1.1 state health and safety responsibilities of employers 1.2 state their own responsibilities for health and safety in the business environment 1.3 state the occupational health and safety guidelines to be followed when using a keyboard and visual display unit 1.4 explain the importance of complying with health and safety requirements.

Learning outcome
The learner will: 2. Know how to work in a safe way in a business environment.
Assessment criteria
The learner can: 2.1 identify possible health and safety hazards in the business environment 2.2 describe ways in which accidents can be avoided in the business environment 2.3 outline why it is important to report hazards and accidents that occur in the business environment 2.4 outline organisational emergency health and safety procedures.

Learning outcome
The learner will: 3. Be able to comply with health and safety requirements in a business environment.
Assessment criteria
The learner can: 3.1 use approved techniques to prevent strain or injury when carrying out work activities 3.2 take action to ensure that their own conduct does not endanger others 3.3 follow manufacturers or organisational instructions for the use of equipment, materials and products 3.4 follow organisational procedures and legal requirements to minimise risks to health and safety.

Unit 102 Use a telephone and voicemail system

UAN:	**K/506/1796**
Level:	1
Credit value:	2
GLH:	20
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAA621 Make and receive telephone calls • CFABAA622 Use voicemail message systems.
Aim:	This unit aims to develop the knowledge and skills required to use a telephone and voicemail system. Upon completion of this unit, learners will be able to make telephone calls, receive telephone calls, and use voicemail systems.

Learning outcome
The learner will: 1. Know how to use a telephone and voicemail system.
Assessment criteria
The learner can: 1.1 outline how a caller's experiences affect their view of an organisation 1.2 outline organisational standards and procedures for communicating on the telephone 1.3 state the importance of following organisational standards and procedures when making and receiving telephone calls 1.4 state organisational fault reporting procedures 1.5 describe why it is important to follow security and data protection procedures when using a telephone system 1.6 state the information to be given out when transferring calls, taking or leaving messages 1.7 state organisational guidelines for deleting voicemail messages.

Learning outcome
The learner will: 2. Be able to make telephone calls.
Assessment criteria
The learner can: 2.1 identify the reason for making a call 2.2 obtain the name and number(s) of the person to be contacted 2.3 communicate information to achieve the call objective(s) 2.4 communicate in a way that meets organisational standards and guidelines.

Learning outcome
The learner will: 3. Be able to receive telephone calls.
Assessment criteria
The learner can: 3.1 identify the caller in accordance with organisational procedures 3.2 deal with calls in accordance with organisational procedures 3.3 pass calls to the right person/department 3.4 take messages when the person to be contacted is unavailable 3.5 represent an organisation in a way that meets the required standards and guidelines.

Learning outcome
The learner will: 4. Be able to use voicemail systems.
Assessment criteria
The learner can: 4.1 use voicemail systems in accordance with manufacturers' instructions 4.2 keep the voicemail message system up to date 4.3 pass on accurate messages in accordance with organisational policies.

Unit 105 Word processing software

UAN:	**L/502/4627**
Level:	1
Credit value:	3
GLH:	20
Relationship to NOS:	This unit is linked to the Level 1 IT User NOS devised by e-Skills UK.
Assessment requirements specified by a sector or regulatory body:	This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.
Aim:	This is the ability to use a software application designed for the creation, editing and production of largely text-based documents. On completion of this unit a candidate should be able to use a range of basic word processing software tools and techniques to produce appropriate, straightforward or routine documents. Any aspect that is unfamiliar will require support and advice from others. Word processing tools and techniques will be described as 'basic' because: • the software tools and functions will be predetermined or commonly used; and • the techniques needed for text entry, manipulation and outputting will be straightforward or routine.

Learning outcome
The learner will: 1. Enter, edit and combine text and other information accurately within word processing documents.
Assessment criteria
The learner can: 1.1 identify what types of information are needed in documents 1.2 identify what templates are available and when to use them 1.3 use keyboard or other input method to enter or insert text and other information 1.4 combine information of different types or from different sources into a document 1.5 enter information into existing tables, forms and templates 1.6 use editing tools to amend document content 1.7 store and retrieve document files effectively, in line with local guidelines and conventions where available.

Learning outcome
The learner will: 2. Structure information within word processing documents.
Assessment criteria
The learner can: 2.1 create and modify tables to organise tabular or numeric information 2.2 select and apply heading styles to text.

Learning outcome
The learner will: 3. Use word processing software tools to format and present documents.
Assessment criteria
The learner can: 3.1 identify what formatting to use to enhance presentation of the document 3.2 select and use appropriate techniques to format characters and paragraphs 3.3 select and use appropriate page layout to present and print documents 3.4 check documents meet needs, using IT tools and making corrections as necessary.

Unit 105 Word processing software

Supporting information

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Enter, edit and combine text and other information accurately within word processing documents

The learner should be able to and understand:

Types of information:

- Text, numbers, images, other graphic elements (eg lines, borders).

Keyboard or other input method:

- Keyboard skills: using the full range of keys, typing accurately and efficiently, keyboard shortcuts.

Other input methods: voice recognition, touch screen, stylus.

Editing tools:

- Editing tools appropriate to the type of information, for example:
  - select, copy, cut, paste, undo, redo, drag and drop, find, replace, insert, delete, size, crop, position.

Store and retrieve:

- Files (eg create, name, open, save, save as, print, close, find).

Outcome 2 Structure information within word processing documents

The learner should be able to and understand:

Tables:

- Add table, insert and delete rows and columns, adjust column width.

Outcome 3 Use word processing software tools to format and present documents

The learner should be able to and understand:

Format characters:

- Size, font style (typeface), colour, bold, underline and italic.

Format paragraphs:

- Alignment, bullets, numbering, line spacing, borders, shading.

Page layout:

- Size, orientation, margins, page breaks, page numbering.
- Standard document layouts (eg letter, memo).

Check word processed documents:

- Spell check, grammar check.
- Typeface and size.
- Page layout, margins, line and page breaks, tables.
- Print preview.
- Accuracy, consistency.

Unit 106 Presentation software

UAN:	**K/502/4621**
Level:	1
Credit value:	3
GLH:	20
Relationship to NOS:	This unit is linked to the Level 1 IT User NOS devised by e-Skills UK.
Assessment requirements specified by a sector or regulatory body:	This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.
Aim:	This is the ability to use software applications to produce effective presentations, which include a combination of media (eg images, animation and sound) for education, entertainment or information sharing. On completion of this unit a candidate should be able to use a range of basic presentation software tools and techniques to produce straightforward or routine presentations. Presentation tools and techniques will be described as 'basic' because: • the software tools and functions will be predefined or commonly used; • the range of entry, manipulation and outputting techniques will be straightforward or routine; and • the inputting, manipulating and outputting of the information will be predetermined, straightforward or routine.

Learning outcome
The learner will: 1. Input and combine text and other information within presentation slides.
Assessment criteria
The learner can: 1.1 identify what types of information are required for the presentation 1.2 select and use different slide layouts as appropriate for different types of information 1.3 enter information into presentation slides so that it is ready for editing and formatting 1.4 identify any constraints which may affect the presentation 1.5 combine information of different forms or from different sources for presentations 1.6 store and retrieve presentation files effectively, in line with local guidelines and conventions where available.

Learning outcome
The learner will: 2. Use presentation software tools to structure, edit and format slides.
Assessment criteria
The learner can: 2.1 identify what slide structure to use 2.2 select and use an appropriate template to structure slides 2.3 select and use appropriate techniques to edit slides 2.4 select and use appropriate techniques to format slides.

Learning outcome
The learner will: 3. Prepare slides for presentation to meet needs.
Assessment criteria
The learner can: 3.1 identify how to present slides to meet needs and communicate effectively 3.2 prepare slides for presentation 3.3 check presentation meets needs, using IT tools and making corrections as necessary.

Unit 106 Presentation software

Supporting information

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Input and combine text and other information within presentation slides

The learner should be able to and understand:

Types of information:

- Text, numbers, images, graphics, sound.

Constraints:

- On content: copyright law (eg on music downloads or use of other people's images), acknowledgment of sources, avoiding plagiarism.
- Equal opportunities, other local guidelines.

Combine information for presentations:

- Combine images, charts or tables with text by inserting, re-sizing and positioning.
- Use of text boxes.

Store and retrieve:

- Files (eg create, name, open, save, save as, print, close, find).

Outcome 2 Use presentation software tools to structure, edit and format slides

The learner should be able to and understand:

Slide structure:

- Layout.
- Use existing templates, designs and styles.
- Organisational guidelines.

Edit slides:

- Drag and drop, find, replace, undo/redo, size, crop and position objects.
- Wrap text, add lines and simple shapes.

Format slides:

- Bullets, numbering, line spacing, alignment, colour, fonts, size, backgrounds.

Outcome 3 Prepare slides for presentation to meet needs

The learner should be able to and understand:

Present slides:

Timing, content, meaning

- Organisation of information.
- Audience needs.

Prepare slides:

- View, re-order, rehearse timing, print slides, print handouts.
- Speaker notes.

Check presentation:

- Spell check, grammar check, orientation, layout, slide order, text alignment and formatting, accuracy.

Unit 107 Database software

UAN:	**H/502/4553**
Level:	1
Credit value:	3
GLH:	20
Relationship to NOS:	This unit is linked to the Level 1 IT User NOS devised by e-Skills UK.
Assessment requirements specified by a sector or regulatory body:	This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.
Aim:	This is the ability to use a software application designed to organise and store structured information and generate reports. On completion of this unit a candidate should be able to use basic database software tools and techniques to: • enter straightforward or routine information into a database; • set up a single table in a flat file database; • retrieve information by running routine queries; and • produce reports using predefined menus or short cuts. The structure and functionality of the database will be predefined. Any aspects that are unfamiliar will require support and advice from others. Database tools and techniques will be described as 'basic' because: • the tools and functions will be predefined or commonly used; and • the techniques for inputting, manipulation and outputting will be straightforward or routine.

Learning outcome
The learner will: 1. Enter, edit and organise structured information in a database.
Assessment criteria
The learner can: 1.1 identify the main components of a database 1.2 create a database table for a purpose using specified fields 1.3 enter structured data into records to meet requirements 1.4 locate and amend data records 1.5 respond appropriately to data entry error messages 1.6 check data meets needs, using IT tools and making corrections as necessary.

Learning outcome
The learner will: 2. Use database software tools to extract information and produce reports.
Assessment criteria
The learner can: 2.1 identify queries which meet information requirements 2.2 run simple database queries 2.3 identify reports which meet information requirements 2.4 generate and print pre-defined database reports.

Unit 107 Database software

Supporting information

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Enter, edit and organise structured information in a database

The learner should be able to and understand:

Database components:

- What types of information are stored:
  - tables, forms, queries, reports.

Enter structured data:

- Tables, fields, records.
- Use of data entry form, create new record, add record to table.

Locate and amend:

- Find, search and replace.
- Sort.
- Wildcards.

Data entry errors:

- Due to field size, data type, validation checks.
- Using help.

Check data:

- Spell check, format, accuracy, consistency.

Outcome 2 Use database software tools to extract information and produce reports

The learner should be able to and understand:

Database queries:

- Alphanumeric sort, filter, single criteria.

Database reports:

- Using menus, wizards or shortcuts.

Unit 108 Spreadsheet software

UAN:	**A/502/4624**
Level:	1
Credit value:	3
GLH:	20
Relationship to NOS:	This unit is linked to the Level 1 IT User NOS devised by e-Skills UK.
Assessment requirements specified by a sector or regulatory body:	This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.
Aim:	On completion of this unit a candidate should be able to use a range of basic spreadsheet software tools and techniques to produce, present and check spreadsheets that are straightforward or routine. Any aspect that is unfamiliar will require support and advice from others. Spreadsheet software tools and techniques will be defined as 'basic' because: • the range of data entry, manipulation, formatting and outputting techniques are straightforward; • the tools, formulas and functions involved will be predetermined or commonly used (for example, sum, divide, multiply, take away and fractions); and • the structure and functionality of the spreadsheet will be predetermined or familiar.

Learning outcome
The learner will: 1. Use a spreadsheet to enter, edit and organise numerical and other data.
Assessment criteria
The learner can: 1.1 identify what numerical and other information is needed and how the spreadsheet should be structured to meet needs 1.2 enter and edit numerical and other data accurately 1.3 store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available.

Learning outcome
The learner will: 2. Use appropriate formulas and tools to summarise and display spreadsheet information.
Assessment criteria
The learner can: 2.1 identify how to summarise and display the required information 2.2 use functions and formulas to meet calculation requirements 2.3 use spreadsheet tools and techniques to summarise and display information.

Learning outcome
The learner will: 3. Select and use appropriate tools and techniques to present spreadsheet information effectively.
Assessment criteria
The learner can: 3.1 select and use appropriate tools and techniques to format spreadsheet cells, rows and columns 3.2 identify which chart or graph type to use to display information 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 and print spreadsheet information 3.5 check information meets needs, using spreadsheet tools and making corrections as necessary.

Unit 108 Spreadsheet software

Supporting information

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Use a spreadsheet to enter, edit and organise numerical and other data

The learner should be able to and understand:

Browser tools:

- Enter, back, forward, refresh, history, bookmark, new window, new tab.
- Numerical and other information.
- Numbers, charts, graphs, text.

Spreadsheet structure:

- Spreadsheet components (eg cells, rows, columns, tabs, pages, charts) and their layout.

Enter and edit:

- Enter data into existing spreadsheet, create new spreadsheet, insert information into single cells, clear cells, edit cell contents, replicate data, find and replace, add and delete rows and columns.

Store and retrieve:

- Files (eg create, name, open, save, save as, print, close, find).

Outcome 2 Use appropriate formulas and tools to summarise and display spreadsheet information

The learner should be able to and understand:

Summarise and interpret:

- Totals and summary information.
- Sorting and display order.
- Lists, tables, graphs and charts.
- Judgment of when and how to use these methods.

Functions and formulas:

- Simple arithmetic formulas (add, subtract, multiply, divide), common functions (eg Sum, Average, Round).
- Design of formulas to meet calculation requirements.

Outcome 3 Select and use appropriate tools and techniques to present spreadsheet information effectively

The learner should be able to and understand:

Format cells:

- Numbers, currency, percentages, number of decimal places, font and alignment, borders and shading.

Format rows and columns:

- Height, width, borders and shading.

Format charts and graphs:

- Chart type (eg pie chart, bar chart, single line graph), title, axis titles, legend.

Page layout:

- Size, orientation, margins, page numbers, date and time.

Check spreadsheet information:

- Accuracy of numbers, formulas and any text.
- Accuracy of results.
- Suitability of charts and graphs.

Unit 201 Manage diary systems

UAN:	**L/506/1807**
Level:	2
Credit value:	2
GLH:	12
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAA431 Use a diary system.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to manage diary systems. Upon completion of this unit, learners will be able to manage diary systems.

Learning outcome
The learner will: 1. Understand the management of diary systems.
Assessment criteria
The learner can: 1.1 explain the importance of keeping **diary systems** up to date 1.2 describe the basis on which bookings and changes are **prioritised** 1.3 explain any **constraints** relating to making bookings for people or facilities 1.4 describe the types of problems that can occur when managing diaries.

Assessment Guidance
Diary systems: • paper-based • electronic • wall chart **Prioritised:** • urgent and important • non-urgent but important • urgent but not important • non-urgent and not important

Constraints:

- availability of room(s)
- costs involved
- availability of attendees

Evidence may be supplied by:

- professional discussion
- reflective account
- questioning

Learning outcome
The learner will: 2. Be able to manage diary systems.
Assessment criteria
The learner can: 2.1 obtain the information needed to make **diary entries** 2.2 make accurate and timely diary entries 2.3 respond to changes in a way that balances and meets the needs of those involved 2.4 communicate up-to-date information to everyone involved 2.5 keep diaries up-to-date 2.6 maintain the requirements of **confidentiality**.

Assessment Guidance
Diary entries: • paper based • electronic **Confidentiality:** eg show how passwords can be used, especially when dealing with sensitive or confidential information; follow organisational procedures and Data Protection Act. **Evidence may be supplied by:** • observation • professional discussion • witness testimony • diary entries • organisational policies and procedures

Unit 202 Produce business documents

UAN:	**Y/506/1809**
Level:	2
Credit value:	3
GLH:	24
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAA211 Produce documents in a business environment.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to produce business documents. Upon completion of this unit, learners will be able to prepare and distribute business documents.

Learning outcome
The learner will: 1. Understand how to prepare business documents.
Assessment criteria
The learner can: 1.1 explain the requirements for: a. language b. tone c. image d. presentation for different documents 1.2 explain how to integrate images into documents 1.3 describe how **corporate identity** impacts upon document production 1.4 explain the requirements of: a. data protection b. copyright c. intellectual property legislation relating to document production 1.5 describe organisational procedures for **version control** 1.6 describe security requirements relating to document production.

Assessment Guidance
Corporate identity: Eg logos, branding, standing, mission statement **Version control:** Date and version number eg 01/14 V.1.1 **Evidence may be supplied by:** • report • questioning • professional discussion

Learning outcome
The learner will: 2. Be able to prepare business documents.
Assessment criteria
The learner can: 2.1 identify the: a. **purpose** b. **audience** c. content d. style e. format f. deadlines of a document 2.2 use document production **resources** in line with organisational guidelines 2.3 use correct: a. **grammar** b. **spelling** c. **punctuation** d. sentence structure 2.4 produce documents that meet the requirements within the agreed timescale.

Assessment Guidance
Purpose: Eg brochure to promote a new product, leaflet for distribution, Annual General Meeting (AGM) report to shareholders etc. **Audience:** • formal/informal • internal use or external customers/client **Resources:** • letterhead template • report template • appropriate software

Grammar:

- nouns - name of person/place eg London, John
- pronouns - instead of noun eg instead of saying 'John' refer to 'him' or 'he'
- verbs - doing things eg 'run'
- adverbs - is a verb executed eg 'he ran quickly'
- adjectives - description of nouns eg reality television

Spelling:

Examples below demonstrate how a similar word has a different meaning:

- accept; except
- advise; advice
- personnel; personal
- as well as words which are often spelt incorrectly - accommodation – accomodation

Punctuation:

- full stops (.)
- commas (,)
- apostrophes (')

Evidence may be presented by:

- product
- questioning
- witness testimony
- reflective account
- observation

Learning outcome
The learner will: 3. Be able to distribute business documents.
Assessment criteria
The learner can: 3.1 provide **final documents** in the appropriate **medium** for authorised readers 3.2 specify restrictions and distribution lists in accordance with the requirements 3.3 maintain the requirements of security in the: a. production b. distribution c. storage of documents.

Assessment Guidance
Final documents: • report • catalogue • brochure • business cards • complimentary slips • design of letterhead **Medium:** A suitable form of communication as in any of the above mentioned. **Evidence may be supplied by:** • product • witness testimony • questioning • observation.

Unit 203 Collate and report data

UAN:	**L/506/1810**
Level:	2
Credit value:	3
GLH:	19
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAD321 Collate and organise data.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to collate and report data. Upon completion of this unit, learners will be able to collate and report data.

Learning outcome
The learner will: 1. Understand how to collate and report data.
Assessment criteria
The learner can: 1.1 describe the different ways that data can be **organised** 1.2 explain why data should be **presented** and reported in different ways 1.3 explain the use of text and diagrams in helping readers to understand the presented data 1.4 explain the requirements relating to: a. confidentiality b. data protection c. intellectual property d. copyright e. legislations.

Assessment Guidance
Organised: • charts • tables • reports **Presented:** • facts • numerical data **Evidence may be supplied by:** • report • questions • professional discussion

Learning outcome
The learner will: 2. Be able to collate data.
Assessment criteria
The learner can: 2.1 ensure that data collected is: a. complete b. accurate c. up-to-date 2.2 check the data against agreed **criteria** 2.3 **organise data** in a way that will enable meaningful analysis 2.4 meet agreed timescales in the collation of data.

Assessment Guidance
Criteria: • the amount of detail required • the time you have to complete the collating of data • how the information will be used **Organise data:** This could be in any of the following formats: • verbally • oral presentation • charts, graphs, tables • brochures, leaflets • formal report • or a combination of all **Evidence may be supplied by**: • product • reflective account • witness testimony • observation

Learning outcome
The learner will: 3. Be able to report data.
Assessment criteria
The learner can: 3.1 present data in the agreed reporting **format** and **house style** 3.2 report data within agreed timescale 3.3 distribute data reports to authorised readers.

Assessment Guidance
Format: • layout • arrangement • design **House style:** The organisation's preferred way of presenting information, eg font style, size, etc. **Evidence may be supplied by**: • product • witness testimony • reflective account • observation.

Unit 204 Store and retrieve information

UAN:	**R/506/1811**
Level:	2
Credit value:	4
GLH:	19
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAD332 Store and retrieve information using a filing system.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to store and retrieve information. Upon completion of this unit, learners will be able to gather, store and retrieve information.

Learning outcome
The learner will: 1. Understand information storage and retrieval.
Assessment criteria
The learner can: 1.1 describe **systems** and **procedures** for storing and retrieving information 1.2 outline **legal** and organisational requirements for information security and retention 1.3 explain how to create **filing systems** to facilitate information **identification** and retrieval 1.4 explain how to use different search techniques to locate and retrieve information 1.5 describe what to do when **problems** arise when storing or retrieving information.

Assessment Guidance
Systems: • paper-based • electronic **Procedures:** Electronic • title or subject • category or reference number • dated • author • storage end date Paper-based – • alphabetical • numerical • chronological • geographical • by subject or category **Legal** requirements: • Freedom of Information Act • Data Protection Act **Filing systems:** • vertical • lateral **Identification:** • index guide • folder tabs • cross indexing **Problems:** • misfiling • not up-to-date filing • hardware • software You will also need to be aware about own level of authority and who to go to if any of the problems are outside own level of authority. **Evidence may be supplied by:** • reflective account • questioning • professional discussion.

Learning outcome
The learner will: 2. Be able to gather and store information.
Assessment criteria
The learner can: 2.1 gather the information required within the agreed timescale 2.2 store files and folders in accordance with organisational procedures 2.3 store information in approved locations 2.4 adhere to organisational policies and procedures, legal and ethical requirements.

Assessment Guidance
Evidence may be supplied by: • product • reflective account • observation • questioning • witness testimony.

Learning outcome
The learner will: 3. Be able to retrieve information.
Assessment criteria
The learner can: 3.1 confirm information to be retrieved and its intended use 3.2 retrieve the required information within the agreed timescale.

Assessment Guidance
Evidence may be supplied by: • product • reflective account • observation • questioning • witness testimony.

Unit 205 Produce minutes of meetings

UAN:	**Y/506/1812**
Level:	2
Credit value:	3
GLH:	13
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAA441 Take minutes.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to produce minutes of meetings. Upon completion of this unit, learners will be able to take notes of meetings and then produce minutes of meetings.

Learning outcome
The learner will: 1. Understand how to take minutes of meetings.
Assessment criteria
The learner can: 1.1 explain the **purpose** of different **types** of minutes and other meeting records 1.2 explain the legal requirements of formal minutes 1.3 describe organisational **conventions** for producing minutes 1.4 describe the **responsibilities** of the minute taker in a meeting 1.5 explain why it is important to maintain confidentiality of meetings, discussions and actions 1.6 explain why it is necessary to record who proposed and seconded suggestions and changes.

Assessment Guidance
Purpose: • solving or resolving business problems • sharing information • decision-making • developing new systems, ideas, practices or processes

Types:

- formal – board, council, management
- informal – unplanned, last minute

Conventions:

Customary way in which things are done within an organisation

Responsibilities:

- agreeing agenda with chairperson
- record those present and any apologies for absence
- clearly and accurately record what is discussed
- record actions and by whom with timelines

Evidence may be supplied by:

- report
- questions
- professional discussion

Learning outcome
The learner will: 2. Be able to take notes of meetings.
Assessment criteria
The learner can: 2.1 take **accurate** notes of the: a. attendance b. proceedings c. areas of discussion d. agreed actions of meetings 2.2 record allocated responsibilities for agreed actions.

Assessment Guidance
Accurate: • precise • correct • true **Evidence may be supplied by:** • product • witness testimony • observation

Learning outcome
The learner will: 3. Be able to produce minutes of meetings.
Assessment criteria
The learner can: 3.1 transcribe notes accurately into meeting minutes using correct: a. language b. **grammar** c. **punctuation** d. sentence structure and in the agreed style 3.2 include agreed attachments or appendices 3.3 obtain approval for the final documents 3.4 distribute minutes to the agreed distribution list 3.5 maintain the requirements of confidentiality.

Assessment Guidance
Grammar: • nouns - name of person/place eg London, John • pronouns - instead of noun eg instead of saying 'John' refer to 'him' or 'he' • verbs - doing things eg 'run' • adverbs - is a verb executed eg 'he ran quickly' • adjectives - description of nouns eg reality television **Punctuation:** • full stops (.) • commas (,) • apostrophes (') **Evidence may be supplied by:** • Product • witness testimony • observation.

Unit 206 Handle mail

UAN:	**D/506/1813**
Level:	2
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAA612 Handle mail.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to handle mail. Upon completion of this unit, learners will be able to deal with both incoming and outgoing mail.

Learning outcome
The learner will: 1. Understand how to deal with mail.
Assessment criteria
The learner can: 1.1 explain how to deal with 'junk' mail 1.2 describe what to do in the event of **problems** arising when dealing with incoming or outgoing mail 1.3 describe how to operate a **franking machine** 1.4 explain how to prepare packages for distribution 1.5 state organisational policies and procedures on: a. mail handling b. security c. the use of courier services 1.6 explain the process for reporting **suspicious or damaged items** in accordance with organisational procedures.

Assessment Guidance
Problems: • deadlines missed • appointments missed • banking of cheques delayed • security issues, damage

Franking Machine:

- correct amount of postage used
- sufficient credit
- returning machine to minimum amount

Suspicious or damaged items:

- record date and time of receipt
- report to appropriate authority

Evidence may be supplied by:

- report
- questions
- professional discussion

Learning outcome
The learner will: 2. Be able to deal with incoming mail.
Assessment criteria
The learner can: 2.1 sort incoming mail in line with organisational procedures 2.2 distribute incoming mail and packages to the right people according to the agreed schedule 2.3 deal with incorrectly addressed and '**junk' mail** in accordance with organisational procedures.

Assessment Guidance
Junk mail: • throw away mail • widely distributed mail • unwanted **Evidence may be supplied by:** • observation • case study/reflective account • witness testimony

Learning outcome
The learner will: 3. Be able to deal with outgoing mail.
Assessment criteria
The learner can: 3.1 organise the collection of outgoing mail and packages on time 3.2 identify the best option for dispatching mail according to the: a. required degree of urgency b. size c. value of the item 3.3 dispatch outgoing mail on time.

Assessment Guidance
Evidence may be supplied by: • observation • case study/reflective account • witness testimony.

Unit 207 Provide reception services

UAN:	**H/506/1814**
Level:	2
Credit value:	3
GLH:	15
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAC312 Provide reception services.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to provide reception services. Upon completion of this unit, learners will be able to provide reception services.

Learning outcome
The learner will: 1. Understand reception services.
Assessment criteria
The learner can: 1.1 explain the **receptionist's role** in representing an organisation 1.2 explain an **organisation's structure** and lines of communication 1.3 describe an organisation's standards of **presentation** 1.4 explain the: a. health b. safety c. security implications of visitors to a building 1.5 explain how to deal with **challenging people**.

Assessment Guidance
Receptionist's role: • security • first impression of organisation • deal with/greet visitors • answer the telephone/transfer calls • data input • receive mail/packages **Organisation's structure:** **Presentation:** **Challenging people:**

Evidence may be supplied by:

-

Learning outcome
The learner will: 2. Be able to provide a reception service.
Assessment criteria
The learner can: 2.1 welcome visitors in accordance with organisational standards 2.2 direct visitors to the person they are visiting in accordance with organisational standards 2.3 record visitors' arrivals and departures in accordance with organisational procedures 2.4 provide advice and accurate information within organisational guidelines on confidentiality 2.5 keep the reception area tidy and materials up-to-date 2.6 answer and deal with telephone calls within organisational standards 2.7 adhere to organisational procedures on: a. entry b. security c. health d. safety.

Assessment Guidance
Evidence may be supplied by: • observation • case study/reflective account • witness testimony.

Unit 208 Prepare text from notes using touch typing

UAN:	**K/506/1815**
Level:	2
Credit value:	4
GLH:	26
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAA213a Prepare text from notes using touch typing • CFABAA213b Prepare text from notes using touch typing (40 wpm) • CFABAA213c Prepare text from notes using touch typing (60 wpm).
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to prepare text from notes using touch typing. Upon completion of this unit, learners will be able to produce text using touch typing.

Learning outcome
The learner will: 1. Understand how to create text from notes.
Assessment criteria
The learner can: 1.1 explain the importance of confirming the purpose of the text and intended audience 1.2 describe the **problems** that may occur in transcribing notes written by others 1.3 explain the consequences of: a. incorrect **spelling** b. incorrect **punctuation** c. incorrect **grammar** d. incorrect sentence structure e. inaccurate content 1.4 explain how **technology features** can help to: a. create b. format c. **check the accuracy** of text 1.5 describe ways of checking produced texts for accuracy and correctness

1.6 describe organisational procedures for the:
   a. storage
   b. security
   c. confidentiality of information.

Assessment Guidance

Problems:

- illegible handwriting
- technical terminology
- combination of numerical/statistical data as well as text

Spelling:

Examples below demonstrate how a similar word has a different meaning:

- accept; except
- advise; advice
- personnel; personal
- as well as words which are often spelt incorrectly eg Accommodation - accomodation

Punctuation:

- full stops (.)
- commas (,)
- apostrophes (‘)

Grammar:

- nouns - name of person/place
- pronouns - instead of noun eg instead of saying ‘John’ refer to ‘him’ or ‘he’
- verbs - doing things eg ‘run’
- adverbs - verb executed eg ‘he ran quickly’
- adjectives - description of nouns eg reality television

Technology features:

- spell check
- grammar check

Check the accuracy:

- input errors
- errors in source material
- amendments to content

Evidence may be supplied by:

- report
- questioning
- professional discussion

Learning outcome
The learner will: 2. Be able to produce text using touch typing.
Assessment criteria
The learner can: 2.1 agree the purpose, **format** and deadlines for texts 2.2 touch type texts at the speed and level of accuracy required by the organisation 2.3 check that the text is accurate and the meaning is clear and correct 2.4 store texts and original notes safely and securely following organisational procedures 2.5 present texts in the required formats and within the agreed timescales.

Assessment Guidance
The notes used for this unit can be from your own or others. Also your organisation will specify the speed you should be aiming for – 20, 30 or 40 words per minute. **Format:** • layout • arrangement • structure **Evidence may be supplied by:** • product • questions • professional discussion • observation.

Unit 209 Prepare text from shorthand

UAN:	**M/506/1816**
Level:	2
Credit value:	6
GLH:	46
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAD311 Prepare text from shorthand • CFABAD311a Prepare text from shorthand (60 wpm) • CFABAD311b Prepare text from shorthand (80 wpm).
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to prepare text from shorthand. Upon completion of this unit, learners will be able to use shorthand to prepare text.

Learning outcome
The learner will: 1. Understand how to use shorthand to create text.
Assessment criteria
The learner can: 1.1 explain the importance of confirming the purpose of the text and intended audience 1.2 describe **techniques** that may be used when taking shorthand notes 1.3 explain the consequences of: a. incorrect **spelling** b. incorrect **punctuation** c. incorrect **grammar** d. incorrect sentence structure e. inaccurate content 1.4 explain how **technology features** can help to: a. create b. format c. **check the accuracy** of text 1.5 describe ways of checking produced texts for accuracy and correctness

1.6 describe organisational procedures for the: a. storage b. security c. confidentiality of information.

Assessment Guidance
Techniques: Spelling out of actual names; towns, cities, people. **Spelling:** • accept; except • advise; advice • personnel; personal • as well as words which are often spelt incorrectly: accommodation - accomodation **Punctuation:** • full stops (.) • commas (,) • apostrophes (') **Grammar:** • nouns - name of person/place eg London, John • pronouns - instead of noun eg instead of saying 'John' refer to 'him' or 'he' • verbs - doing things eg 'run' • adverbs - is a verb executed eg 'he ran quickly' • adjectives - description of nouns eg reality television **Technology features:** • spell check • grammar check **Check the accuracy:** • input errors • errors in source material • amendments to content **Evidence may be supplied by:** • report • questioning • professional discussion

Learning outcome
The learner will: 2. Be able to use shorthand to prepare text.
Assessment criteria
The learner can: 2.1 agree the: a. purpose b. **format** c. deadlines for texts 2.2 take dictation using shorthand at the speed required by the organisation 2.3 input and format text from shorthand notes 2.4 check that text is accurate and the meaning is clear and correct 2.5 store texts and original notes safely and securely following organisational procedures 2.6 present texts in the required formats and within the agreed timescales.

Assessment Guidance
Your organisation will specify the speed you will be expected to achieve; this could be 20, 30 or 40 words per minute. **Format:** • layout • arrangement • structure **Evidence may be supplied by:** • product • questions • professional discussion • observation.

Unit 210 Prepare text from recorded audio instruction

UAN:	**T/506/1817**
Level:	2
Credit value:	4
GLH:	15
Relationship to NOS:	This unit is linked to the Business & Administration (2013) NOS: • CFABAD312 Prepare text from recorded audio instruction • CFABAD312a Prepare text from recorded audio instruction (40 wpm) • CFABAD312b Prepare text from recorded audio instruction (60 wpm).
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to prepare text from recorded audio instruction. Upon completion of this unit, learners will be able to prepare text from recorded notes.

Learning outcome
The learner will: 1. Understand the preparation of text from recorded notes.
Assessment criteria
The learner can: 1.1 explain the importance of confirming the purpose of the text and intended audience 1.2 describe the main features of the different types of **technology** that can be used for playing back recordings 1.3 explain how different **speaking styles** of those giving dictation can affect outputs 1.4 explain the consequences of: a. incorrect **spelling** b. incorrect **punctuation** c. incorrect **grammar** d. incorrect sentence structure e. inaccurate content 1.5 describe ways of checking produced texts for **accuracy** and correctness 1.6 describe organisational procedures for the: a. storage b. security c. confidentiality of information.

Assessment Guidance

Technology:

- dvd
- mp3 player
- cassette
- micro-cassette
- headset
- foot pedal

Speaking styles:

- someone with an accent
- someone with a speech impediment
- someone who speaks too quickly

Spelling:

Examples below demonstrate how a similar word has a different meaning:

- accept; except
- advise; advice
- personnel; personal
- as well as words which are often spelt incorrectly: accommodation - accomodation

Punctuation:

- full stops (.)
- commas (,)
- apostrophes (')

Grammar:

- nouns - name of person/place eg London, John
- pronouns - instead of noun eg instead of saying 'John' refer to 'him' or 'he'
- verbs - doing things eg 'run'
- adverbs - is a verb executed eg 'he ran quickly'
- adjectives - description of nouns eg reality television

Accuracy:

Check for:

- input errors
- errors in source material
- amendments to content
- technology - spell check/grammar check

Evidence may be supplied by:

- report
- questioning
- professional discussion

Learning outcome
The learner will: 2. Be able to prepare text from recorded notes.
Assessment criteria
The learner can: 2.1 agree the: a. purpose b. format c. deadlines for texts 2.2 input and **format** text from audio recording 2.3 check that text is accurate and the meaning is clear and correct 2.4 store texts and original recordings safely and securely following organisational procedures 2.5 present texts in the required formats and within the agreed timescales.

Assessment Guidance
Your organisation will specify the speed you will be expected to achieve; this could be 20, 30 or 40 words per minute. **Format:** • layout • arrangement • structure **Evidence may be supplied by:** • product • questions • professional discussion • observation.

Unit 212 Archive information

UAN:	**T/506/1865**
Level:	2
Credit value:	3
GLH:	14
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAD334 Provide archive services.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to archive information. Upon completion of this unit, learners will be able to archive information.

Learning outcome
The learner will: 1. Understand archiving requirements.
Assessment criteria
The learner can: 1.1 describe different **ways of archiving** information 1.2 describe how to retrieve archived **information** 1.3 describe organisational **procedures** for: a. archiving b. retrieving c. deleting information 1.4 explain the importance of document retention policies to organisations' 1.5 describe the security and access requirements of offsite archives.

Assessment Guidance
Ways of archiving: • manual paper-based system • electronic based system **Information:** • physical text eg letter, fax • visual eg photograph • audio eg tape recording • digital eg e-mail

Procedures:

Records should:

- be titled
- identify the creator
- have expiry date
- retention time limit clearly stated
- have agreed level of access
- clearly state disposal instructions

Evidence may be supplied by:

- report
- questioning
- professional discussion

Learning outcome
The learner will: 2. Be able to archive information.
Assessment criteria
The learner can: 2.1 confirm the information to be archived 2.2 identify the retention period post-archiving 2.3 archive information within the agreed timescale 2.4 keep archive records up-to-date and indexed 2.5 report **problems** to the right person 2.6 adhere to organisational: a. policies and procedures b. legal and ethical c. requirements when archiving information.

Assessment Guidance

Problems:

- design of the system
- poor administration of the system
- maintenance of the system

Evidence may be supplied by:

- product
- observation
- questioning
- witness testimony
- organisation policies and procedures.

Unit 213 Maintain and issue stationery and supplies

UAN:	**Y/506/2295**
Level:	2
Credit value:	3
GLH:	18
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAF141 Maintain and issue stock items.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to maintain and issue stationary and supplies. Upon completion of this unit, learners will be able to maintain and issues stocks of stationery and supplies.

Learning outcome
The learner will: 1. Understand the maintenance of stationery and supplies.
Assessment criteria
The learner can: 1.1 describe organisational policies, procedures and levels of authority in maintaining supplies 1.2 explain how to carry out a **stock check** of stationery 1.3 describe the types of problems that may occur with deliveries and stock items 1.4 explain how to deal with **problems** that occur with deliveries and stock items 1.5 explain the **factors** to take into account when ordering stationery 1.6 explain the benefits and limitations of different potential suppliers, against organisational requirements 1.7 explain how to calculate quantities of stationery and supplies to be ordered 1.8 describe how to dispose of or recycle waste.

Assessment Guidance
Stock check: To confirm individual items are in stock through carrying out stock checks eg physical count, records. **Problems:** • number being delivered does not match that ordered • late delivery • item no longer available **Factors:** • price • availability • delivery date(s) • discount on bulk ordering • choice • one supplier or two **Evidence may be supplied by:** • report • questioning • professional discussion

Learning outcome
The learner will: 2. Be able to maintain stocks of stationery and supplies.
Assessment criteria
The learner can: 2.1 maintain stocks of stationery and supplies at the required levels 2.2 maintain the requirements of storage and security 2.3 carry out **stock checks** in accordance with organisational policies and procedures 2.4 chase up late or incorrect orders with suppliers.

Assessment Guidance
Stock checks: • correct volume of stock held **Evidence may be supplied by:** • product • reflective account • observation • witness testimony • questioning

Learning outcome
The learner will: 3. Be able to issue stock of stationery and supplies.
Assessment criteria
The learner can: 3.1 issue stationery and supplies in accordance with organisational requirements 3.2 maintain up-to-date records of stock: a. issued b. received c. in storage 3.3 deal with unwanted or damaged stationery and supplies safely 3.4 recommend ways in which the system for receiving and issuing stock could be improved.

Assessment Guidance
Evidence may be supplied by: • product • observation • reflective account • witness testimony • questioning.

Unit 214 Use and maintain office equipment

UAN:	**J/506/1868**
Level:	2
Credit value:	2
GLH:	10
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAA231 Use office equipment.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to use and maintain office equipment. Upon completion of this unit, learners will be able to use and maintain office equipment.

Learning outcome
The learner will: 1. Understand how to use office equipment.
Assessment criteria
The learner can: 1.1 describe organisational: a. policies b. procedures c. levels of authority in maintaining **office equipment** 1.2 describe how to use different types of office equipment 1.3 explain the reasons for following manufacturer's and organisational instructions when operating equipment 1.4 describe the types of equipment faults likely to be experienced and the correct way of dealing with these.

Assessment Guidance
Office equipment: • personal • shared • specialised Examples of the above: – printers/photocopiers – scanners – digital cameras – speakers/earphones – memory sticks – binding machines – fax machines – shredders – calculators – telephones – security systems – franking machines – computers/laptops – projectors **Evidence may be supplied by:** • report • questioning • professional discussion

Learning outcome
The learner will: 2. Be able to use and maintain office equipment.
Assessment criteria
The learner can: 2.1 use the equipment that is appropriate to the task in accordance with the manufacturer's instructions 2.2 follow organisational procedures to keep waste to a minimum 2.3 maintain the equipment to the standard specified by the organisation or the manufacturer 2.4 make sure that equipment conforms with health and safety requirements 2.5 report problems that cannot be resolved to the right person.

Assessment Guidance
Evidence may be supplied by: • product • questioning • professional discussion • observation.

Unit 215 Contribute to the organisation of an event

UAN:	**L/506/1869**
Level:	2
Credit value:	3
GLH:	23
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAA311 Support the organisation and co-ordination of events.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to contribute to the organisation of an event. Upon completion of this unit, learners will be able to carry out pre-event actions, set up an event and then carry out post-event actions.

Learning outcome
The learner will: 1. Understand event organisation.
Assessment criteria
The learner can: 1.1 explain the: a. roles b. responsibilities c. accountabilities of individuals involved in the event 1.2 explain the purpose and features of different **types of events** 1.3 describe the type of **resources** needed for different types of events 1.4 describe the different **needs attendees** may have and how to meet these 1.5 explain the requirements of: a. health b. safety c. security when organising events 1.6 describe the types of **problems** that may occur during events and how to deal with them.

Assessment Guidance
Types of Events: eg • Annual General Meeting (AGM) • a trade show • a training conference • an academic conference • a team building event • an awards ceremony • a seminar • a wedding **Resources:** These will depend on the type of event, choose at least two from the list above and detail what resources would be required for each one. **Needs of attendees may include:** • overnight accommodation • car parking permits • special dietary requirements • disabled access to venue **Problems:** Eg • equipment breakdown • speaker is late • refreshments late • power cut **Evidence may be supplied by:** • report • professional discussion • questioning

Learning outcome
The learner will: 2. Be able to carry out pre-event actions.
Assessment criteria
The learner can: 2.1 identify venue requirements for an event 2.2 obtain resources within the agreed timescalesdistribute pre-event documentation to delegates in accordance with the event plan 2.3 co-ordinate attendee responses within the agreed timescale 2.4 identify any special requirements of event attendees.

Assessment Guidance
Evidence may be supplied by: • product • witness testimony • professional discussion • questioning • observation

Learning outcome
The learner will: 3. Be able to set up an event.
Assessment criteria
The learner can: 3.1 set up layout and resources in accordance with the event plan 3.2 confirm that all identified resources are in place and meet requirements 3.3 behave in a way that maintains organisational values and standards.

Assessment Guidance
Evidence may be supplied by: • observation • product • witness testimony • questioning

Learning outcome
The learner will: 4. Be able to carry out post-event actions.
Assessment criteria
The learner can: 4.1 ensure the venue is restored to the required conditions in accordance with the terms of the contract 4.2 carry out follow-up actions in accordance with the event plan and agreements made at the event.

Assessment Guidance
Evidence may be supplied by: • observation • product • professional discussion • witness testimony.

Unit 216 Organise business travel or accommodation

UAN:	**D/506/1875**
Level:	2
Credit value:	4
GLH:	23
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAA322 Organise business travel or accommodation.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to organise business travel or accommodation. Upon completion of this unit, learners will be able to research business travel or accommodation options for others, and then use the outcomes of that research to make business or travel arrangements for others.

Learning outcome
The learner will: 1. Understand the organisation of business travel or accommodation for others.
Assessment criteria
The learner can: 1.1 explain any **budgetary or policy constraints** relating to business travel or accommodation 1.2 describe **financial arrangements** relating to business travel or accommodation 1.3 explain how to make arrangements for visas and related foreign travel documentation 1.4 describe the procedures for obtaining or exchanging foreign currency.

Assessment Guidance
Budgetary or policy constraints: eg • threshold cost of hotels • maximum allowance for meals • standard class rail and air fare only • use of specific travel agent **Financial arrangements:** • appropriate authorisation • receipts must accompany expenses claims • company credit card • travel account **Evidence may be supplied by:** • report • professional discussion • questioning

Learning outcome
The learner will: 2. Be able to research business travel or accommodation options for others.
Assessment criteria
The learner can: 2.1 identify different suppliers that are capable of delivering the services required within budget 2.2 recommend travel or accommodation arrangements that best meet the requirements 2.3 recommend suppliers of travel or accommodation that best meet the requirements.

Assessment Guidance
Evidence may be supplied by: • report • professional discussion • questioning • observation

Learning outcome
The learner will: 3. Be able to make business travel or accommodation arrangements for others.
Assessment criteria
The learner can: 3.1 confirm the **requirements** for travel or accommodation 3.2 agree arrangements that specify any limitations, prohibitions or responsibilities and which meet the requirements 3.3 prepare and issue **itinerary**/schedule documentation that reflect agreed arrangements accurately 3.4 obtain travel or accommodation documentation within the required timescale 3.5 confirm the acceptability of payments to be made within the limits of their own authority 3.6 keep up-to-date records of travel or accommodation arrangements and agreed commitments 3.7 adhere to: a. organisational policies and procedures b. legal and ethical requirements when making business travel or accommodation arrangements for others.

Assessment Guidance
Requirements: • budget • when/who/where/what • group or individual • special requirements **Itinerary:** • programme of events • timetable, plan **Evidence may be supplied by:** • product • observation • witness testimony • organisational policies and procedures.

Unit 217 Provide administrative support for meetings

UAN:	**H/506/1876**
Level:	2
Credit value:	4
GLH:	28
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAA411 Support the organisation of meetings • CFABAA412 Plan and organise meetings.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to provide administrative support for meetings. Upon completion of this unit, learners will be able to make administrative preparations for meetings and also support the administration of meetings.

Learning outcome
The learner will: 1. Understand the administration of meetings.
Assessment criteria
The learner can: 1.1 describe the purpose of the **meeting** and who needs to attend 1.2 explain why it is important to have a **minimum number** of attendees for a meeting 1.3 explain ways to achieve maximum attendance at meetings 1.4 explain the: a. access b. health c. safety d. security requirements relating to meetings 1.5 describe how to set up the **resources** needed for a meeting 1.6 explain the responsibilities of the meeting chair and meeting secretary 1.7 explain the difference between formal and informal meetings 1.8 explain the legal implications of formal meetings.

Assessment Guidance
Meetings: • informal • formal • annual general meeting (agm) • board meeting • committee meeting • departmental meeting • virtual **Minimum number** required for a meeting to take place is known as Quorum. **Resources:** eg • laptop • multi-media projector • whiteboard • flip chart/easel • pencils • paper • documents **Evidence may be supplied by:** • report • professional discussion • questioning

Learning outcome
The learner will: 2. Be able to make administrative preparations for meetings.
Assessment criteria
The learner can: 2.1 book meeting: a. venue b. resources c. facilities in accordance with the brief 2.2 collate documents needed for a meeting 2.3 distribute meeting: a. invitations b. documents c. other meeting-related requirements within the timescale 2.4 confirm meeting attendees and any **special requirements**.

Assessment Guidance
Special requirement: eg • disabled access • dietary requirements • larger print documents **Evidence may be supplied by:** • product • observation • questioning

Learning outcome
The learner will: 3. Be able to support the administration of meetings.
Assessment criteria
The learner can: 3.1 take action to ensure that the equipment allocated for use at a meeting functions correctly 3.2 provide support to meetings in accordance with requests 3.3 ensure the venue is restored to the required conditions after the meeting 3.4 distribute meeting records promptly to the agreed distribution list 3.5 carry out any follow-up actions in accordance with the brief.

Assessment Guidance
Evidence may be supplied by: • product • witness testimony • professional discussion • questioning • observation.

Unit 218 Administer human resource records

UAN:	**T/506/1879**
Level:	2
Credit value:	3
GLH:	28
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAB151 Administer human resource records.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to administer human resource records. Upon completion of this unit, learners will able to administer human resource (HR) information.

Learning outcome
The learner will: 1. Understand the administration of Human Resource (HR) records.
Assessment criteria
The learner can: 1.1 explain what **HR-related information** needs to be kept and why 1.2 explain the relationship of HR to other parts of an organisation 1.3 describe the impact of other organisations on HR activities 1.4 describe the features and uses of organisational systems for managing human resource information 1.5 explain the requirements of: a. confidentiality b. data protection c. system security 1.6 describe the information to be provided for different management reports 1.7 explain the limits of their own authority in administering HR records 1.8 explain the implications of not keeping HR records up-to-date 1.9 explain the actions to be taken in the event of problems arising or incomplete or inaccurate data.

Assessment Guidance
HR-related information: eg • performance appraisals • job description • payroll details • holiday entitlement • training and development needs • national insurance, tax code etc. • medical notifications **Evidence may be supplied by:** • report • questioning • professional discussion

Learning outcome
The learner will: 2. Be able to administer HR information.
Assessment criteria
The learner can: 2.1 keep HR records up-to-date 2.2 process data in accordance with organisational procedures 2.3 provide information within the limits of confidentiality 2.4 adhere to: a. organisational policies and procedures b. legal and ethical requirements.

Assessment Guidance
Evidence may be supplied by: • product (not confidential) • observation • witness testimony • professional discussion • questioning.

Unit 219 Administer the recruitment and selection process

UAN:	**A/506/1883**
Level:	2
Credit value:	3
GLH:	25
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • BAB152 Administer the recruitment and selection process.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to administer the recruitment and selection process. Upon completion of this unit, learners will be able to administer the recruitment and selection process.

Learning outcome
The learner will: 1. Understand the recruitment and selection process.
Assessment criteria
The learner can: 1.1 explain the different administrative requirements of internal and external recruitment 1.2 describe the uses of a **job description** and a **person specification** 1.3 explain the administrative requirements of different methods of selection 1.4 explain the requirements of different **pre-employment checks** to be carried out 1.5 explain what information needs to be communicated to successful and unsuccessful applicants at each stage of the recruitment and selection process 1.6 explain the requirements of: a. confidentiality b. data protection c. system security.

Assessment Guidance
Job description: Defines roles and responsibilities. **Person specification:** Lists skills and experience required. **Pre-employment check:** eg • Criminal Reference Checks (CRC) • reference check • valid driving licence **Evidence may be supplied by:** • report • professional discussion • questionings

Learning outcome
The learner will: 2. Be able to administer the recruitment process.
Assessment criteria
The learner can: 2.1 check that the job or role details are correct and are in accordance with the brief 2.2 place job advertisements in the agreed **media** in accordance with the timescales 2.3 record applicant responses within the timescale 2.4 provide requested information to applicants in accordance with organisational policies and procedures 2.5 adhere to: a. organisational policies and procedures b. legal and ethical requirements.

Assessment Guidance
Media: eg • national newspapers • local newspapers • intranet • media sites as appropriate (internet) • professional journals **Evidence may be supplied by:** • product • observation • witness testimony • professional discussion • questioning

Learning outcome
The learner will: 3. Be able to administer the selection process.
Assessment criteria
The learner can: 3.1 invite shortlisted applicants to participate in the selection process in accordance with organisational procedures 3.2 co-ordinate selection arrangements in accordance with the brief 3.3 carry out agreed pre-employment checks within the agreed timescale 3.4 inform applicants of the outcome of their application in accordance with organisational policies and procedures 3.5 keep selection records up-to-date.

Assessment Guidance
Evidence may be supplied by: • product • observation • witness testimony • professional discussion • questioning.

Unit 221 Administer finance

UAN:	**R/506/1890**
Level:	2
Credit value:	4
GLH:	21
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to administer finance. Upon completion of this unit, learners will understand finance for administrators and will be able to administer finance.

Learning outcome
The learner will: 1. Understand finance for administrators.
Assessment criteria
The learner can: 1.1 describe **organisational hierarchy** and levels of authority for financial transactions 1.2 explain organisational systems for: a. sales invoicing b. purchasing c. payments d. receipts 1.3 describe the use of a: a. **purchase order** b. **invoice** c. **receipts** d. **expenses**.

Assessment Guidance
Organisational hierarchy: • head of finance • section heads • finance administrators Check own organisation to see if any or all of the above apply.

Purchase order:
Agreement between purchaser and supplier.

Invoice:
Request for payment.

Receipts:
Acknowledgment of purchase/payment.

Expenses:
Everyday expenditure.

Evidence may be supplied by:

- report
- professional discussion
- questioning

Learning outcome
The learner will: 2. Be able to administer finance.
Assessment criteria
The learner can: 2.1 record income and expenditure in accordance with organisational policies and procedures 2.2 process purchase orders, invoices or expenses in accordance with organisational policies and procedures 2.3 process outgoing payments to the correct recipient 2.4 accept or allocate incoming payments in accordance with organisational policies.

Assessment Guidance
Evidence may be supplied by: • product • observation • witness testimony • questioning.

Unit 223 Buddy a colleague to develop their skills

UAN:	**M/506/1895**
Level:	2
Credit value:	3
GLH:	19
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFACSD5249 Buddy a colleague to develop their customer service skills.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to buddy a colleague to develop their skills. Upon completion of this unit, learners will be able to develop a plan to buddy a colleague and then put that plan into action by supporting a buddy colleague in carrying out work activities.

Learning outcome
The learner will: 1. Understand how to buddy a colleague.
Assessment criteria
The learner can: 1.1 describe what is expected of a **buddy** 1.2 explain techniques to give positive **feedback** and constructive criticism 1.3 explain **techniques** to establish rapport with a buddy.

Assessment Guidance
Buddy: The role may be to show a new member of staff where different departments are within the building, how to complete certain regular tasks etc. **Feedback:** eg • information specific • issue focused • based on observations • 'sandwich' strategy ie positive/negative/positive • person to person • timely **Techniques:** • be approachable • look for things you have in common • hone your listening skills • develop active listening • have empathy • reflect and clarify • use open body language **Evidence may be supplied by:** • report • professional discussion • questioning

Learning outcome
The learner will: 2. Be able to plan to buddy a colleague.
Assessment criteria
The learner can: 2.1 agree which aspects of a colleague's work may benefit from buddying 2.2 confirm organisational requirements for: a. standards of behaviour b. presentation c. communication d. performance of a buddy colleague 2.3 agree a schedule of meetings that minimise disruption to business 2.4 agree: a. specific b. measurable c. achievable d. realistic e. time-bound (SMART) buddying objectives.

Assessment Guidance
Evidence may be supplied by: • observation • witness testimony • professional discussion • reflective account

Learning outcome
The learner will: 3. Be able to support a buddy colleague carrying out work activities.
Assessment criteria
The learner can: 3.1 remain unobtrusive while a buddy colleague carries out their work activities 3.2 provide examples of how to carry out tasks correctly 3.3 identify instances of good practice and areas for improvement through observation 3.4 praise a buddy colleague on well completed tasks 3.5 give constructive feedback on ways in which a buddy could improve performance 3.6 offer a buddy hints and tips based on personal experience.

Assessment Guidance
Evidence may be supplied by: • observation • witness testimony • professional discussion • reflective account.

Unit 227 Employee rights and responsibilities

UAN:	**L/506/1905**
Level:	2
Credit value:	2
GLH:	16
Relationship to NOS:	N/A
Assessment type:	Short Answer Questions (C&G) Assignment or Skills CFA on-line ERR workbook
Assessment requirements specified by a sector or regulatory body:	N/A
Aim:	This unit aims to develop the knowledge needed to understand their employee rights and responsibilities. Upon completion of this unit, learners will have developed an understanding of the role of organisations and industries, as well as gaining an understanding and awareness of employers' expectations and employees' rights and obligations.

Learning outcome
The learner will: 1. Understand the role of organisations and industries.
Assessment criteria
The learner can: 1.1 explain the role of their own occupation within an organisation and industry 1.2 describe career pathways within their organisation and industry 1.3 identify sources of information and advice on an: a. industry b. occupation c. training d. career pathway 1.4 describe an organisation's principles of conduct and codes of practice 1.5 explain issues of public concern that affect an organisation and industry 1.6 describe the: a. types b. roles c. responsibilities of representative bodies and their relevance to their own role.

Learning outcome
The learner will: 2. Understand employers' expectations and employees' rights and obligations.
Assessment criteria
The learner can: 2.1 describe the employer and employee statutory rights and responsibilities that affect their own role 2.2 describe an employer's expectations for employees' standards of: a. personal presentation b. punctuality c. behaviour 2.3 describe the procedures and documentation that protect relationships with employees 2.4 identify sources of information and advice on employment rights and responsibilities.

Unit 227 Employee rights and responsibilities

Supporting information

Evidence requirements

5528-227 Employee rights and responsibilities must be assessed by one of the versions of the short answer question assignments provided by City & Guilds, available from the City & Guilds website and marked internally by the centre.

Unit 228 Process information about customers

UAN:	**R/506/2134**
Level:	2
Credit value:	3
GLH:	14
Relationship to NOS:	This unit is linked to the Customers Service (2013) National Occupational Standards: • CFACSA6 Process information about customers
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to process customer information. Upon completion of this unit, learners will be able to process customer information.

Learning outcome
The learner will: 1. Understand how to process customer information.
Assessment criteria
The learner can: 1.1 describe the **functions** of **customer information systems** 1.2 explain the way in which **legislation and regulatory requirements** affect the processing of customer information 1.3 explain different responsibilities and levels of authority for processing customer service information 1.4 explain the **reliability** of sources of customer information 1.5 explain the **validity** of customer information.

Assessment guidance
Functions: eg • retain customer information • manage information • engage/make contact with customers • create reports. **Customer information systems:** • bespoke systems • customer relationship management system (CRM) • management information system **Legislation and regulatory requirements:** • Data Protection Act • Principles of Data Protection Act • Equality Act • internal policies and procedures **Reliability:** • up to date • checked and confirmed • accurate **Validity:** Checking information is authentic/genuine **Evidence may be supplied by:** • professional discussion • questioning • reflective accounts

Learning outcome
The learner will: 2. Be able to process customer information.
Assessment criteria
The learner can: 2.1 record information about customers in line with **organisational standards and procedures** 2.2 keep customer information up to date 2.3 respond to requests for customer information from **authorised people** in a timely manner 2.4 retrieve customer information that meets the requirements of the request 2.5 supply customer information in a format appropriate for the recipient 2.6 adhere **to organisational policies and procedures, legal and ethical requirements** when processing customer information.

Assessment guidance

Organisational standards and procedures:
They will be different according to the organisation and will relate to the information to be retained, how it will be collected and used.

Authorised people:
Those within the organisation who have authority to access and/or use the data.

Organisational policies and procedures which relate to:

- roles and responsibilities showing limits of authority
- handling of data, including collection and usage
- data protection and confidentiality policy

Legal requirements eg

- Data Protection Act
- Equality Act.

Ethical requirements

- organisational principles
- values
- fairness

Evidence may be supplied by:

- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- customer records/database*
- organisational policies and procedures, legislative requirements and organisational ethical policies. **

Note: this unit is about processing information about customers.
Here the candidate will require to be observed processing information about customers over time. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

** While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 230 Deliver customer service

UAN:	**A/506/2130**
Level:	2
Credit value:	5
GLH:	27
Relationship to NOS:	Customers Service (2013) National Occupational Standards: • CFACSA1 Maintain a positive and customer-friendly attitude • CFACSA2 Behave in a way that gives a good customer service impression • CFACSA4 Give customers a positive impression of yourself and your organisation • CFACSA7 Live up to the brand promise when delivering customer service • CFACSA8 Make customer service personal • CFACSB1 Do your job in a customer friendly way • CFACSB2 Deliver reliable customer service • CFACSF2 Deliver customer service within the rules
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to deliver customer service. Upon completion of this unit, learners will be able to prepare to deal with customers, provide customer service, and support improvements to customer service delivery.

Learning outcome
The learner will: 1. Understand customer service delivery.
Assessment criteria
The learner can: 1.1 explain the relationship between customers' **needs** and **expectations** and customer **satisfaction** 1.2 describe the **features and benefits** of an organisation's products and/or services 1.3 explain the importance of treating customers as individuals 1.4 explain the importance of **balancing promises** made to customers with the needs of an organisation 1.5 explain when and to whom to escalate problems 1.6 describe methods of measuring their own effectiveness in the delivery of customer service.

Assessment guidance
Needs: What the customer must have/requires. **Expectations:** What the customer thinks they should experience or get. **Satisfaction** When an organisation meets or surpasses a customer's expectations. **Features and benefits:** Feature – what a product or service does. Benefit – how the features meet the customer needs. **Balancing promises:** Deciding when the promises can be met by the organisation and when it is not viable for the organisation to do what the customer wants either financially or practically. **Evidence may be supplied by**: • professional discussion • questioning • reflective account • marketing materials

Learning outcome
The learner will: 2. Understand the relationship between customer service and a brand.
Assessment criteria
The learner can: 2.1 explain the importance of a **brand** to an organisation 2.2 explain how a **brand** affects an organisation's customer **service offer** 2.3 explain the importance of using customer service language that supports a **brand promise** 2.4 identify their own role in ensuring that a **brand promise** is delivered.

Assessment guidance
Brand: A brand is the way in which an organisation's products, services are identified. **Service offer:** A service offer is what the organisation says it will offer its customers and is therefore what the customer comes to expect. A service offer covers eg the refund policy, its delivery times and the service it will offer. **Brand promise:** Branding is the way a product or service is recognised and is the promise made by the organisation to its customer. When a customer sees a particular brand they trust it assists them when making buying decisions as they know what to expect. If they do not recognise the brand they will have no clear expectations of the product or service and will almost be taking a risk on any purchase or usage. **Evidence may be supplied by:** • professional discussion • questioning • reflective account • marketing materials • brand

Learning outcome
The learner will: 3. Be able to prepare to deal with customers.
Assessment criteria
The learner can: 3.1 keep up to date with an organisation's products and/or services 3.2 prepare **resources** that are necessary to deal with customers before starting work.

Assessment guidance
Resources: eg: • marketing materials • manuals* • documentation* • schedules/rotas/daily plan • customer records* • any monetary requirements. **Evidence may be supplied by**: • observation • witness testimony • customer records* • professional discussion • questioning • reflective account • knowledge base content* • service offer* • marketing materials • manuals* • documentation* • schedules/rotas/daily plan • legislative requirements and organisational ethical policies** Note: this unit is about delivering customer service on a daily basis. Here the candidate will require to be observed over time preparing for and then dealing with a variety of customers. Witness testimonies can be added if necessary. *Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria. **Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Learning outcome
The learner will: 4. Be able to provide customer service.
Assessment criteria
The learner can: 4.1 maintain organisational standards of **presentation and behaviour** when providing customer service 4.2 adapt their own behaviour to meet customers' needs or expectations 4.3 respond to customers' requests in line with **organisational guidelines**

4.4	inform customers of the progress of their requests
4.5	confirm that customers' expectations have been met in line with the service offer
4.6	adhere to **organisational policies and procedures, legal and ethical requirements** when providing customer service.

Assessment guidance

Presentation and behaviour:

- personal presentation/dress/uniform
- presentation of work area
- attitude
- tone of voice
- body language

Organisational guidelines:

- organisational policies/procedures
- work instructions
- scripts

Organisational policies and procedures which relate to:

- roles and responsibilities showing limits of authority
- service offer
- handling of customer issues

Legal requirements

eg

- Sale of Goods Act (Sale and Supply of Goods to Consumers Regulations)
- Trade Descriptions Act
- Data Protection Act
- Equality Act

Ethical requirements:

- organisational principles
- values
- fairness

Evidence may be supplied by:

- observation
- witness testimony
- customer records*
- professional discussion
- questioning
- reflective account
- service offer*
- work instructions/scripts*
- organisational policies and procedures, legislative requirements and organisational ethical policies**

Note: this unit is about delivering customer service on a daily basis. Here the candidate will require to be observed over time preparing for and then dealing with a variety of customers. Witness testimonies can be added if necessary.

*Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria.

**Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Learning outcome
The learner will: 5. Be able to support improvements to customer service delivery.
Assessment criteria
The learner can: 5.1 identify ways that customer service could be improved for an organisation and individuals 5.2 share information and ideas with colleagues and/or service partners to support the **improvement** of service delivery.

Assessment guidance
Improvements: The candidate does not need to put improvements in place but make suggestions and then share these ideas and related information. **Evidence may be supplied by**: • observation • witness testimony • customer records* • professional discussion • questioning • reflective account • service offer* • customer feedback. • organisational policies and procedures, legal requirements and ethical policies** Note: This unit is about delivering customer service on a daily basis. Here the candidate will require to be observed over time preparing for and then dealing with a variety of customers. Witness testimonies can be added if necessary. *Internal/organisational documentation need not be held in the candidate's portfolio but held in the workplace with reference made to where it can be found and its relevance to the criteria. ** Note: While the candidate can provide a copy of the organisational policies and of the organisational ethical policy/requirements (or refer to them), this on its own is not sufficient. The candidate will require to demonstrate their application and be able to discuss them, showing understanding of how they are applied. This also applies to legal requirements.

Unit 234 Spreadsheet software

UAN:	**F/502/4625**
Level:	2
Credit value:	4
GLH:	30
Assessment type:	Portfolio of evidence or Assignment (from 7574 ITQ Users)
Relationship to NOS:	This unit is based on the Level 2 National Occupational Standards for IT users.
Assessment requirements specified by a sector or regulatory body:	This unit will be assessed as specified in the Tech Partnership.
Aim:	This is the ability to use a software application designed to record data in rows and columns, perform calculations with numerical data and present information using charts and graphs. On completion of this unit a candidate should be able 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. Spreadsheet software tools and techniques will be defined 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 outcome
The learner will: 1. Use a spreadsheet to enter, edit and organise numerical and other data.
Assessment criteria
The learner can: 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.

Assessment Guidance
Evidence may be supplied by: • observation • witness testimony • professional discussion • product • reflective account

Learning outcome
The learner will: 2. Select and use appropriate formulas and data analysis tools to meet requirements.
Assessment criteria
The learner can: 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.

Assessment Guidance
Evidence may be supplied by: • observation • witness testimony • professional discussion • product • reflective account

Learning outcome
The learner will: 3. Select and use tools and techniques to present and format spreadsheet information.
Assessment criteria
The learner can: 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 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.

Assessment Guidance
Evidence may be supplied by: • observation • witness testimony • professional discussion • product • reflective account.

Unit 234 Spreadsheet software

Supporting information

Teaching guidance

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Use a spreadsheet to enter, edit and organise numerical and other data

The learner should understand:

Enter and edit:

- insert data into single and multiple cells, clear cells, edit cell contents, replicate data, find and replace, add and delete rows and columns
- use absolute and relative cell references
- add data and text to a chart

Numerical and other information:

- numbers, charts, graphs, text, images

Spreadsheet structure:

- spreadsheet components (e.g. cells, rows, columns, tabs, pages, charts, ranges, workbooks, worksheets)
- structure, design and layout

Store and retrieve:

- save, save as, find, open, close
- open CSV file in spreadsheet application, save spreadsheet file as CSV
- templates

Outcome 2 Select and use appropriate formulas and data analysis tools to meet requirements

The learner should understand:

Analyse and manipulate:

- totals, sub-totals and summary data
- sorting and display order
- lists, tables, graphs and charts
- filter rows and columns
- judgment of when and how to use these methods

Functions and formulas:

- design of formulas to meet calculation requirements
- mathematical, statistical, financial, conditional
- logical functions

Outcome 3 Select and use tools and techniques to present and format spreadsheet information

The learner should understand:

Format cells:

- numbers, currency, percentages, number of decimal places, font and alignment, shading and borders; date and time formats, wrap text

Format rows and columns:

- height, width, borders and shading, hide, freeze

Format charts and graphs:

- format charts and graphs: chart type (e.g. pie chart, bar chart, single line graph, area, column, x-y scatter, stock, radar, doughnut, surface), title, axis titles, legend, change chart type, move and resize chart

Page layout:

- size, orientation, margins, header and footer, page breaks, page numbers, date and time, adjust page set up for printing

Check spreadsheet information:

- accuracy of numbers, formulas and any text
- accuracy of results; suitability of charts and graphs
- reveal formulae
- layout and formatting
- validity and accuracy of analysis
- clarity of overall spreadsheet

Problems with spreadsheets:

- using help sorting out errors in formulas, circular reference

Unit 236 Processing customers' financial transactions

UAN:	**F/601/8320**
Level:	2
Credit value:	4
GLH:	8
Relationship to NOS:	CP01: Process customers' financial transactions
Aim:	This unit may be suitable for learners whose work involves receiving from and/or making payments to customers and monitoring customers' payments. The learner will make sure that the amount and documentation are accurate, that all procedures are carried out in line with the organisation's requirements and that customer payments are made on time.

Learning outcome
The learner will: 1. Be able to deal with customer transactions and documentation.
Assessment criteria
The learner can: 1.1 receive payments from and/or make payments to customers 1.2 confirm that amounts and balances are accurate 1.3 process payments accurately in accordance with the organisation's procedures 1.4 recognise discrepancies in documentation and take appropriate action 1.5 make sure that all documentation, entries and records are accurate and legible.

Assessment Guidance
Evidence may be supplied by: • observation • witness testimony • professional discussion • questioning • product • reflective account

Learning outcome
The learner will: 2. Be able to comply with all codes, laws and regulatory requirements.
Assessment criteria
The learner can: 2.1 follow the organisation's systems, procedures and organisational timescales 2.2 explain the organisation's customer service and complaints procedure 2.3 act within personal authority limits and recognising when to refer to others 2.4 explain the sources of information and advice within the organisation 2.5 identify the different methods of receiving financial information 2.6 comply with legal requirements, industry regulations, organisational policies and professional codes 2.7 explain the organisation's requirements relating to the application of codes, laws and regulatory requirements and their impact on the job role.

Assessment Guidance
Evidence may be supplied by: • observation • witness testimony • professional discussion • questioning • product • reflective account.

Unit 239 Manage personal performance and development

UAN:	**L/506/1788**
Level:	2
Credit value:	4
GLH:	18
Relationship to NOS:	Management & Leadership (2012) National Occupational Standards: • CFAM&LAA1 Manage yourself
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to manage personal performance and development. Upon completion of this unit, learners will be able to manage their own performance, time and workload. They will also be able to identify their own development needs and fulfil a personal development plan.

Learning outcome
The learner will: 1. Be able to manage personal performance.
Assessment criteria
The learner can: 1.1 agree specific, measurable, achievable, realistic and time-bound (SMART) objectives that align with business needs with line manager 1.2 agree criteria for measuring progress and achievement with line manager 1.3 complete tasks to agreed timescales and quality standards 1.4 report problems beyond their own level of competence and authority to the appropriate person 1.5 take action needed to resolve any problems with personal performance.

Assessment Guidance

1.1

Objectives are targets to be implemented or completed, or standards of performance to be achieved and maintained.

Objectives provide focus and clear direction, and should be SMART:

- Specific: Clear, unambiguous, straightforward, understandable
- Measurable: Related to quantified or qualitative performance measures
- Achievable: With known resources
- Realistic: Linked to business needs
- Time-bound: Building-in completion date and review dates

In this criterion the learner is required to provide evidence that he or she has:

- identified the relevant business needs of the organisation and agreed this with their line manager
- agreed appropriate and correct SMART objectives with their line manager that support those business needs

1.2

It is important and necessary to measure, or monitor, progress towards objectives with the line manager for a variety of reasons:

- It provides information to see if objectives are being achieved
- It enables any adjustments or improvements to the task to be carried out if they are required
- Monitoring performance with the line manager will provide valuable information for a 'two-way' appraisal or performance review.

The criteria used for measuring progress and achievement will depend upon the SMART objectives, and these criteria will need to be agreed with the line manager.

In this criterion the learner is required to provide evidence that he or she has agreed appropriate and correct criteria for measuring progress towards, and achievement of, SMART objectives with his or her line manager.

1.3

All tasks should be completed within the timescale agreed and to the quality standard required.

Other quality standards make reference to 'conformance with requirements', but the basis of all the definitions of 'Quality' is that the features affecting quality are capable of being tested and are thus objective measures of performance.

In this criterion the learner is required to provide evidence that tasks have been completed to agreed timescales and that they have also been completed to agreed and objective (or measurable) quality standards.

1.4

'Competence' is the ability of an individual to carry out a task properly to the required standard, whilst 'authority' allows its holder to act in certain ways designated by the organisation and to directly influence the actions of others through instructions.

Authority may be:

- Line Authority - reflects the organisational hierarchy
- Staff authority - the right to advise or assist those who possess line authority as well as other staff personnel
- Functional Authority - given to individuals who, in order to meet responsibilities in their own areas, must be able to exercise some control over organisation members in other areas.

In this criterion the learner is required to provide evidence that problems that are beyond both their own level of competence **and** their authority have been reported to the appropriate person.

1.5

Problems with personal performance may arise for a variety of reasons, such as:

- Unfair or unclear expectations as to the task or the individual's role
- Medical issues
- Personal or family issues
- Job dissatisfaction
- Workplace conflict
- Inadequate knowledge or skills
- etc.

It is necessary to get to the root cause of any problem with personal performance, and to ensure that the action taken to resolve the problem is appropriate and within the organisation's guidelines, policies and procedures, if applicable.

In this criterion the learner is required to provide evidence that the root cause of any problems with personal performance is identified, and that appropriate action is taken to resolve the problems.

Learning outcome
The learner will: 2. Be able to manage their own time and workload.
Assessment criteria
The learner can: 2.1 plan and manage workloads and priorities using time management tools and techniques 2.2 take action to minimise distractions that are likely to limit the effective management of time and the achievement of objectives 2.3 explain the benefits of achieving an acceptable "work-life balance"

Assessment Guidance

2.1

Examples of time management tools and techniques include:

- Covey Time (Task) Management Matrix
- 'To-do' list (monthly, weekly, daily)
- Scheduling tasks and activities
- Diary, paper-based or electronic
- Bespoke time-management documentation or software
- etc.

In this criterion the learner is required to provide evidence that he or she is managing workloads and priorities using appropriate time management tools and techniques.

2.2

Distractions that are likely to limit the effective management of time and the achievement of objectives include:

- Telephone interruptions
- Colleagues dropping in without appointments
- Meetings, both scheduled and unscheduled
- Lack of objectives, priorities, and deadlines
- Cluttered desk and personal disorganisation (not having the tools/resources/supplies at your disposal)
- Involvement in routine and detail that should be delegated to others
- Unclear, or lack of, communication and instruction
- Inability to say 'no'
- etc.

In this criterion the learner is required to provide evidence that he or she has taken appropriate action to minimise the effects of workplace distractions that are likely to limit the effective management of time and the achievement of objectives.

2.3

There are benefits to the employer and to the employee from achieving an acceptable "work-life" balance.

Employer benefits include:

- reduced staff turnover
- lower recruitment and training costs, due to decreased turnover
- reduced absenteeism due to higher levels of well being
- gaining a reputation as a good employer or an employer of choice
- better attraction and retention of staff
- reduced stress levels amongst staff
- improved morale and job satisfaction
- greater staff loyalty and commitment
- improved productivity

Employee benefits include:

- a reduction in the impact of work on home and family life and vice a versa
- reduced stress levels and higher levels of well being
- control over time management in meeting work-life commitments
- autonomy to make decisions regarding work-life balance
- increased focus, motivation and job satisfaction knowing that family and work commitments are being met
- increased job security from the knowledge that an organisation understands and supports workers with family responsibilities

In this criterion the learner is required to **explain** how benefits for the employee or for the employer follow from having an acceptable "work-life balance"; it is not acceptable to merely list a number of benefits.

Learning outcome
The learner will: 3. Be able to identify their own development needs.
Assessment criteria
The learner can: 3.1 identify organisational policies relating to personal development 3.2 explain the need to maintain a positive attitude to feedback on performance 3.3 explain the potential business benefits of personal development 3.4 identify their own preferred learning style(s) 3.5 identify their own development needs from analyses of the role, personal and team objectives 3.6 use feedback from others to identify their own development needs 3.7 agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs.

Assessment Guidance
3.1 Organisational policies relating to personal development will vary, depending upon the type and nature of the organisation. Examples include: • Staff Development Policy • Training and Development Policy • Professional Development Policy • Organisational and Professional Development Policy • etc. In this criterion the learner is required to identify organisational policies relating to personal development. **3.2** Feedback is important to keep colleagues informed as to how well they are doing and to help them improve.

Properly given, feedback should be about performance, not personality, so the individual receiving the feedback should not allow emotions to be part of his or her reaction to feedback: a positive attitude is required in order to listen carefully to what is being said, to take the time to consider the value of the feedback, and to ask the person giving the feedback on how you can improve.

In this criterion the learner is required to describe what is meant by a positive attitude in order to then explain why it is necessary to maintain a positive attitude to feedback on performance.

3.3

'Personal development' is taken here to include 'professional development' in the sense of undertaking personal development to build human capital, skills and knowledge.

The potential business benefits of personal development include:

- improved workplace performance
- linking training and development activities to business needs and career development
- identifying talent and potential in the organisation
- improved staff morale and motivation
- introducing fresh ideas in the organisation
- linking training and development to SMART objectives and performance management
- etc.

In this criterion the learner is required to describe what is meant by personal development in order to then explain potential business benefits of personal development; it is not sufficient to merely list potential business benefits.

3.4

Individuals differ in how they learn, and there are a number of learning styles models that can be used to identify an individual's learning style, perhaps the most widespread being the Honey and Mumford adaptation of Kolb's experiential model:

- Activist
- Reflector
- Theorist
- Pragmatist

In this criterion the learner is required to provide evidence that he or she has correctly identified their own learning style using an appropriate model.

3.5

Analysing own role and personal and team objectives is undertaken in order to identify the future development needs that are required to acquire the skills and knowledge for career development and for effective performance in the workplace both now and in the future.

Use will be made of internal documents such as job description, person specification, personal development plans, business plans, team plans and objectives, etc., and relevant documents will be analysed to identify development needs.

In this criterion the learner is required to analyse relevant documents, where available, relating to own role and personal and team objectives in order to identify own development needs.

3.6

Feedback from others is important in identifying development needs as good feedback enables individuals and groups to be aware of what they do and how they do it, and helps individuals learn, grow and develop.

Feedback may be formal, as in a performance review, or it may be informal, as in on-going advice or observations given outside the formal process.

In this criterion the learner is required to provide evidence that he or she has used examples of formal or informal feedback from others to identify development needs.

3.7

Having identified development objectives from feedback and analysing own role and personal and team objectives, the next step is to turn them into SMART objectives that are agreed with the appropriate manager or supervisor.

In this criterion the learner is required to provide evidence that appropriate and correct SMART development objectives that align with organisational and personal needs are agreed with the appropriate manager or supervisor.

Learning outcome
The learner will: 4. Be able to fulfil a personal development plan.
Assessment criteria
The learner can: 4.1 agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms 4.2 make use of formal development opportunities that are consistent with business needs 4.3 use informal learning opportunities that contribute to the achievement of personal development objectives 4.4 review progress against agreed objectives and amend plans accordingly 4.5 share lessons learned with others using agreed communication methods.

Assessment Guidance
4.1 The SMART objectives should now form part of an agreed personal development plan that sets out what needs to be done and how it is to be done, and provides details of the resources required, the timescales, and the review mechanisms.

In this criterion the learner is required to provide evidence that he or she has agreed a correct and appropriate personal development plan that specifies actions, methods, resources, timescales and review mechanisms.

4.2

Formal development takes place in an organised and structured setting with explicit learning outcomes and objectives, and typically leads to certification or some other recognition that it has been completed to a certain standard.

In this criterion the learner is required to provide evidence that he or she has made use of formal development opportunities that are consistent with business needs.

4.3

Informal learning results from daily activities related to work, family or leisure, and is not organised or structured in terms of learning outcomes and objectives.

In this criterion the learner is required to provide evidence that he or she has used informal development opportunities that contribute to the achievement of personal development objectives.

4.4

Agreed objectives and review mechanisms are addressed in assessment criteria 3.7 and 4.1.

In this criterion the learner is required to provide evidence that he or she has correctly and appropriately reviewed progress against agreed objectives and amended plans accordingly.

4.5

Reflecting on personal development provides an opportunity to ask such questions as 'What went well?', 'What didn't go well?', and 'What would I do differently next time?'

Sharing 'lessons learned' with others enables successes to be built upon and previous mistakes to be avoided, and may take place, for example, in a performance review or appraisal interview, a learning community, or as part of a review of a development activity.

In this criterion the learner is required to provide evidence that he or she has shared lessons learned from own personal development with others using agreed communication methods.

Unit 240 Develop working relationships with colleagues

UAN:	**R/506/1789**
Level:	2
Credit value:	3
GLH:	19
Relationship to NOS:	Management & Leadership (2012) National Occupational Standards: • CFAM&LDD1Develop and sustain productive working relationships with colleagues
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to develop working relationships with colleagues, and introduces learners to the key principles underpinning effective team working. Upon completion of this unit, learners will be able to maintain effective working relationships with colleagues and work collaboratively to resolve problems.

Learning outcome
The learner will: 1. Understand the principles of effective team working.
Assessment criteria
The learner can: 1.1 outline the benefits of effective team working 1.2 describe how to give feedback constructively 1.3 explain conflict management techniques that may be used to resolve team conflicts 1.4 explain the importance of giving team members the opportunity to discuss work progress and any issues arising 1.5 explain the importance of warning colleagues of problems and changes that may affect them.

Assessment Guidance

1.1

Benefits of effective team working include:

- greater flexibility within the team
- high morale
- increased efficiency
- mutual support
- better ideas from the team
- etc.

In this criterion the learner is required to provide an outline of the main features of benefits of effective team working; it is not acceptable to merely list benefits.

1.2

Conflict may be defined as the internal or external discord that occurs as a result of differences in ideas, values or beliefs of two or more people.

Conflict management is important in order to:

- maintain morale
- maintain performance standards
- minimise absenteeism
- promote a safe working environment
- maintain group cohesion
- etc.

Conflict management techniques that may be used to resolve team conflicts include:

- Win-Win (collaborating)
  - Attempting to identify the underlying concerns in order to find an alternative that satisfies everyone
- Win-Win (collaborating)
  - Attempting to identify the underlying concerns in order to find an alternative that satisfies everyone
- Compromise
  - Working to a mutually-acceptable solution that partially satisfies everyone
- Forcing
  - Using formal authority or coercion to get one's own way at the expense of others
- Avoiding
  - Not addressing the conflict, withdrawing from a threatening situation
- Accommodating
  - Neglecting own concerns to satisfy others

In this criterion the learner is required to explain how conflict management techniques may be used to resolve team conflicts. (Using examples may make this more relevant.)

1.3

Discussing work progress and any issues arising with team members provides an opportunity to:

- acknowledge team achievements and celebrate success
- discuss strengths and identify areas for improvement
- clarifying and agreeing any steps required to improve performance
- identify how systems, procedures, work methods might be improved
- etc.

In this criterion the learner is required to describe reasons that explain the importance of giving team members the opportunity to discuss work progress and any issues arising. (Using examples may make this more relevant.)

1.4

Warning colleagues of problems and changes that may affect them allows issues to be addressed before they get out of hand and are still manageable, and allows possible solutions to be explored as opposed to merely reacting to a situation.

Failure to warn might also threaten the trust relationship with colleagues, who will typically assume the worst if there is a failure to communicate.

In this criterion the learner is required to describe reasons that explain the importance of warning colleagues of problems and changes that may affect them. (Using examples may make this more relevant.)

Learning outcome
The learner will: 2. Be able to maintain effective working relationships with colleagues.
Assessment criteria
The learner can: 2.1 recognise the contribution of colleagues to the achievement of team objectives 2.2 treat colleagues with respect, fairness and courtesy 2.3 fulfil agreements made with colleagues 2.4 provide support and constructive feedback to colleagues.

Assessment Guidance
2.1 Colleagues want to be appreciated, and recognising their contribution to the achievement of team objectives lets them know that their efforts are noticed and valued. Praise should be timely, direct, personal and specific, with colleagues being told exactly what they do well and why their contribution is appreciated. There are numerous ways to recognise an colleague's contribution, and the praise must be given in a way that is meaningful to the colleague: some colleagues may prefer to be praised in public, for example, whilst others may be more comfortable with being praised in

private, and some colleagues will find it more meaningful to have their contribution recognised by a higher-level manager.

In this criterion the learner is required to provide evidence that he or she has recognised in an appropriate and meaningful way the contribution of colleagues to the achievement of team objectives.

2.2

Colleagues will be better motivated to complete allocated tasks if they feel they are being listened to and that they are appreciated as part of a team.

Treating colleagues with respect, courtesy and fairness is fundamental in creating a positive climate within the team in order to influence team members to feel motivated.

In this criterion the learner is required to provide appropriate evidence that he or she has treated colleagues with respect and fairness and courtesy.

2.3

Fulfilling agreements is one way to ensure you develop working relationships with colleagues, within your own organisation and within other organisations, which are productive in terms of supporting and delivering your work and that of your organisation.

Colleagues should be informed when agreements have been fulfilled, or advised promptly of any difficulties or where it will be impossible to fulfil agreements.

In this criterion the learner is required to provide evidence of correctly and appropriately fulfilling agreements made with colleagues.

2.4

Providing support to colleagues might include:

- explaining policies, procedures, task requirements
- helping with their workload
- problem-solving
- obtaining additional resources
- providing encouragement
- providing constructive feedback that focuses on issues and solutions, not personalities or blame

In this criterion the learner is required to provide evidence of appropriate support to colleagues and constructive feedback to two or more colleagues.

Learning outcome
The learner will: 3. Be able to collaborate with colleagues to resolve problems.
Assessment criteria
The learner can: 3.1 take others' viewpoints into account when making decisions 3.2 take ownership of problems within own level of authority 3.3 take action to minimise disruption to business activities within their own level of authority 3.4 resolve problems within their own level of authority and agreed contribution.

Assessment Guidance

3.1

Empathy is the ability to identify and understand another's situation, feelings and viewpoints, and to 'put yourself in the other person's shoes'.

Successful leaders and managers work hard to understand others' viewpoints in a particular situation. They acknowledge others' viewpoints when making decisions and consider the impact of their choices on the wellbeing and interests of others.

In this criterion the learner is required to provide evidence that he or she understands the viewpoints of colleagues in particular situations and has taken their viewpoints into account when making decisions on those situations.

3.2

'Level of authority' refers to the different hierarchical management levels in an organisation and the duties and responsibilities assigned to each of those levels.

The more senior roles in an organisation will have greater authority to give instructions and make decisions and to ensure compliance with organisational policies and procedures, and problems that lie outside own level of authority must be referred to a more senior manager at the appropriate level.

The authority given to a role is usually formalised in a job description, which will generally include the roles and responsibilities of the job as well as the job-holder's direct report.

In this criterion the learner is required to provide evidence that he or she has taken ownership of problems within own level of authority.

3.3

Business activities are activities that provide a product or service that customers require, and a disruption to business activities could have far-reaching consequences for the organisation, such as:

- loss of income
- loss of reputation
- loss of customers
- penalty payments for not meeting deadlines
- failure of the business

It is therefore the responsibility of everyone in an organisation to take appropriate and effective action, within their own level of authority, to minimise disruption to business activities.

In this criterion the learner is required to provide evidence that he or she has taken effective and appropriate action, within own level of authority, to minimise disruption to business activities.

3.4

'Resolve problems' is taken here to mean the resolution of problems relating to working relationships with colleagues.

To resolve a problem is to find an effective and satisfactory answer or solution, and a problem with working relationships with colleagues may be resolved formally or informally, depending upon the nature and extent of the problem.

If the problem with a working relationship is a relatively minor issue, then an informal resolution may be possible.

If, however, the problem is more serious, then it may be necessary to use the organisation's formal disciplinary or grievance procedures.

If the formal procedures are used, then each procedure should specify the level of authority appropriate to each stage.

In this criterion the learner is required to provide evidence that he or she has appropriately resolved, either formally or informally, problems relating to working relationships with colleagues. The evidence should additionally demonstrate the learner's agreed contribution within the learner's own level of authority.

Unit 243 Presentation software

UAN:	**M/502/4622**
Level:	2
Credit value:	4
GLH:	30
Assessment type:	Portfolio of evidence or Assignment (from 7574 ITQ Users)
Relationship to NOS:	This unit is linked to the Level 2 IT User NOS devised by Tech Partnership.
Assessment requirements specified by a sector or regulatory body:	This unit will be assessed as specified in the e-Skills IT User Assessment Strategy 2009.
Aim:	This is the ability to use software applications to produce effective presentations, which include a combination of media (eg images, animation and sound) for education, entertainment or information sharing. On completion of this unit a candidate should be able to select and use a wide range of intermediate presentation software tools and techniques effectively to produce presentations that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others. Presentation tools and techniques 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 outcome
The learner will: 1. Input and combine text and other information within presentation slides.
Assessment criteria
The learner can: 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.

Assessment Guidance
Evidence may be supplied by: • observation • witness testimony • professional discussion • questioning • product • reflective account

Learning outcome
The learner will: 2. Use presentation software tools to structure, edit and format slide sequences.
Assessment criteria
The learner can: 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.

Assessment Guidance
Evidence may be supplied by: • observation • witness testimony • professional discussion • questioning • product • reflective account

Learning outcome
The learner will: 3. Prepare slideshow for presentation.
Assessment criteria
The learner can: 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.

Assessment Guidance
Evidence may be supplied by: • observation • witness testimony • professional discussion • questioning • product • reflective account.

Unit 243 Presentation software

Supporting information

The following guidance is not a prescriptive list of activities; they are suggested areas that a learner could show competence in to achieve this unit. Centres may use some or all these activities or some of their own devising to teach and help learners complete this unit successfully.

Outcome 1 Input and combine text and other information within presentation slides

The learner should be able to and understand:

Types of information:

- Text, numbers, images, graphics, sound, video.

Images, video or sound for presentations:

- Clip-art, photo, scanned images, borders, create diagrams or graphics, image formats.
- Pre-recorded audio/video clips, audio and video formats.

Charts and tables for presentations:

- Table, pie chart, graph, diagram, organisational chart, flowchart.

Combine information for presentations:

- Combine images, charts, tables with text by inserting, re-sizing and positioning; use of text boxes, presentation with audio and/or video, import information produced using other software.
- Reference external information with hyperlinks.

Constraints:

- On content: copyright law (eg on music downloads or use of other people's images), acknowledgment of sources, avoiding plagiarism.
- Equal opportunities, other local guidelines.
- On delivery (eg environment, timing).

Store and retrieve:

- Save, save as, find, open, close.
- Naming protocols.
- Reducing file size, save presentation as a stand-alone show or as web pages.

Outcome 2 Use presentation software tools to structure, edit and format slide sequences

The learner should be able to and understand:

Slide structure:

- Layout.
- Use existing templates, designs and styles, organisational guidelines.
- Adapt and create new templates.

Presentation effects:

- Video, sound, animation, slide transitions, visual and sound effects, hyperlinks.

Edit slides:

- Size, crop and position objects.
- Wrap text, add captions and graphic elements, slide order.
- Change orientation.

Animation and transition effects:

- Adding and removing hyperlinks.
- Apply and create transitions, apply animations.

Format slides:

- Bullets, numbering, line spacing, alignment, colour, fonts, size, backgrounds, colour schemes, master slides.
- Themes.

Outcome 3 Prepare slideshow for presentation

The learner should be able to and understand:

Present slides:

- Timing, content, meaning.
- Organisation of information.
- Audience needs, location.

Prepare slides:

- View and re-order slides.
- Rehearse timing and effects.
- Set up and amend slide show settings.
- Print slides, handouts and speaker notes.

Check presentation:

- Spell check; grammar check, orientation, layout, slide order, text alignment and formatting, accuracy, clarity, transitions and timings.

Quality problems with presentations:

- Will vary according to the content, for example:
    - Text: formatting, styles.
    - Images: size, position, orientation
    - Effects: timing, brightness, contrast, sound levels, order of animations.

Unit 265 Medical terminology

UAN:	**L/505/1245**
Level:	2
Credit value:	6
GLH:	45
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 outcome
The learner will: 1. Know the structure and meaning of medical word parts.
Assessment criteria
The learner can: 1.1 identify definitions of medical **word parts** 1.2 identify medical terms derived from the medical word parts.

Range
Word parts Prefixes, roots and suffixes, use of combining vowel. See list in Appendix 1.

Learning outcome
The learner will: 2. Know the meaning of medical terminology relating to the human body.
Assessment criteria
The learner can: 2.1 identify definitions of medical terms relating to the **human body**.

Range
Human body Includes medical terms of anatomy and physiology (structure, function, organs, systems), diseases, conditions and procedures. See list in Appendix 2.

Learning outcome
The learner will: 3. Know the meaning of medical terminology relating to the medical specialities.
Assessment criteria
The learner can: 3.1 identify definitions of medical terms relating to the **medical specialities**.

Range
Medical specialities See list in Appendix 3.

Learning outcome
The learner will: 4. Know the meaning of pharmaceutical abbreviations.
Assessment criteria
The learner can: 4.1 identify the meaning of pharmaceutical abbreviations.

Range
Pharmaceutical abbreviations See list in Appendix 4.

Appendix 1 Word parts list – Level 2 Medical terminology

Learning outcome 1 only

This list can be referred to as a framework for other learning outcomes, however candidates will need to know the **full range** of terminology in relation to the individual body systems.

Prefixes

Prefix	Meaning
a-	absence of
ab-	away from
ad-	towards
an-	absence of
ante-	before
anti-	against
auto-	self
bi-	two
bio-	life
brady-	slow
circum-	around
co- / con-	together / joined
contra-	against
cryo-	cold
cyano-	blue
de-	away from / removing
dia-	through
diplo-	double
dys-	difficult / abnormal / painful
ecto-	external / outside / without
en- / endo-	within / in / into
epi-	upon / above / on
ery- / erythro-	red
hemi-	half
hetero-	unlike / dissimilar
homo-	same

Prefix	Meaning
hyper-	above / high / in excess of normal
hypo-	low / below / under / less than normal
inter-	between
intra-	within / inside
iso-	equal
kypho-	crooked / hump / curvature
latero-	side
leuco- / leuko-	white
lordo-	curvature forward
macro-	large
mal-	poor / abnormal / impaired
mega- / megalo-	big / enlarged
melano-	black / dark / pigment
meta-	after / beyond
micro-	small
mono-	one / single
multi-	many
neo-	new
oligo-	scanty / deficiency
ortho-	straight
pachy-	thick
pan-	all
para-	alongside

Prefix	Meaning
peri-	around
polio-	grey
poly-	many
post-	after
pre- / pro-	before
quadri-	four
retro-	backwards
sclero-	hard

Prefix	Meaning
scolio-	sideways / twisted
semi-	half
steno-	narrow
sub-	below
super- / supra-	above
syn-	with / together / union
tachy-	rapid / fast
uni-	one

Word Roots

Word Root	Meaning
abdomino-	abdomen
adeno-	gland (any)
albumen- / albumin-	albumin / a protein
alveolo-	air sac
andro-	man
angio-	vessel
aorto-	aorta / main artery
appendico-	appendix
arterio-	artery
arthro-	joint
atrio-	atrium / upper chamber of heart
bili-	bile
blepharo-	eyelid
bronchiolo-	bronchiole / small air tube in lung
broncho-	bronchus / tube to the lung
cardio-	heart
carpo-	wrist / hand
cephalo-	head
cerebro-	cerebrum / part of brain
cerebello-	cerebellum / lower lobe of brain
cervico-	cervix / neck
cholangio-	bile / biliary vessels
chole-	bile
cholecysto-	gallbladder
chondro-	cartilage
colo- / colono-	colon (large intestine)
colpo-	vagina
corono-	heart / crown
costo-	rib
cranio-	skull containing brain

Word Root	Meaning
cysto-	bladder
cyto-	cell
dento-	tooth
derm- / dermato-	skin
duodeno-	duodenum (part of intestine)
encephalo-	brain
endocardio-	lining of heart
endometrio-	endometrium (lining of uterus)
entero-	intestine
epididymo-	tubules above testes / testicles
febro-	fever
feto-	fetus / unborn baby
gastro-	stomach
gingivo-	gums
glosso-	tongue
glyco-	sugar
gyno- / gynaeco-	woman
haemo- / haemato-	blood
hep- / hepato-	liver
hernio-	hernia, rupture, protrusion
histo-	tissue
hydro-	water
hystero-	womb
iatro-	doctor / physician
ileo-	ileum (part of intestine)
ilio-	ilium (bone of the pelvis)
immuno-	immunity
jejuno-	jejunum (part of intestine)

Word Root	Meaning
laparo-	abdomen / abdominal wall
laryngo-	larynx / voice-box
leuco-	white
lipo-	fat
litho-	stone
lymphadeno-	lymph gland
lymphangio	lymph vessel
lympho-	lymphatic, lymph / tissue fluid
mammo- / masto-	breast
mandibulo-	lower jaw bone
maxillo-	upper jaw bone
meningo-	meninges / membrane covering brain and spinal cord
menisco-	meniscus (knee cartilage)
meno-	Menstruation / monthly period
metro-	womb
myelo-	marrow / spinal cord
myo- / myos-	muscle
myocardio-	myocardium (heart muscle)
myometrio-	myometrium (muscle of uterus)
myringo-	ear drum
naso-	nose
nato-	birth
necro-	death
nephro-	kidney
neuro-	nerve
oculo-	eye
oesophago-	oesophagus (gullet)
onco-	tumour
onycho-	nail
oophoro-	ovary
ophthalmo-	eye

Word Root	Meaning
opto-	sight / eye
orchio- / orchido-	testis / male gonad / male gland
osteo-	bone
oto-	ear
paedo-	child
pancreato-	pancreas / a gland
patho-	disease
pericardio-	outer layer of heart (covering of heart)
phago-	swallow, eat
Phaso-	speech
pharmaco-	drug
pharyngo-	pharynx / throat
phlebo-	vein
pleuro-	lung covering / membrane
pneumo- / pneumono-	air / gas / lung
pnoe-	breathing
procto-	anus / rectum
prostato-	prostate / a male gland
phallo-	penis
pulmono-	lung
pyo-	pus
pyro-	fever
recto-	rectum
reno-	kidney
rhino-	nose
salpingo-	fallopian / uterine tube
sigmoido-	sigmoid colon / part of large intestine
spleno-	spleen
steato-	fat
stoma- / stomato-	mouth
tarso-	foot / eyelid
thermo-	heat

Word Root	Meaning
thoraco-	chest / thorax
thrombo-	blood clot
thyro-	thyroid / gland in neck
tonsillo-	tonsils / lymph gland
tox- / toxico-	poison
tracheo-	windpipe / trachea
tympano-	ear drum
uretero-	ureter / tube from kidney

Word Root	Meaning
urethro-	urethra / tube from bladder
uro-	urine / urinary organs
utero-	womb
vaso-	vessel
veno-	vein
ventrico- / ventriculo-	ventricle (lower chamber of heart)

Suffixes

Suffix	Meaning
-a	condition of
-aemia	blood
-ac	concerning / pertaining
-al	concerning / pertaining to
-algia	pain
-blast	immature cell
-cele	swelling / protrusion
-centesis	to puncture / tapping
-cide	kill / destroy
-cyte	cell
-demic	people / population
-desis	binding together
-dynia	pain
-ectasis	dilation
-ectomy	surgical removal of
-form	shape / form of
-gen	producing / forming
-genesis	forming or origin
-genic	producing or forming
-gram	picture / tracing
-graph	machine that records / tracing
-graphy	procedure of recording / tracing
-gravida	pregnancy
-ia / -iasis	condition of / state of
-iac	pertaining to
-iatric	pertaining to medicine / physician
-ic	concerning pertaining to
-iosis / -ism	condition of / state of
-itis	inflammation of
-lith	stone

Suffix	Meaning
-lithiasis	condition / presence of stones
-lysis	destruction / splitting / breaking down
-malacia	softening
-megaly	enlargement of
-meter	measure
-natal	birth
-oedema	swelling caused by excess fluid
-oid	likeness / resembling
-ology	study of / science of
-oma	tumour
-opia	condition of the eye
-orrhage	burst forth / bleeding
-orrhagia	condition of heavy bleeding
-orrhaphy	sew / repair
-orrhoea	flow / discharge
-oscopy	examination with a lighted instrument
-osis	condition of
-ostomy	artificial opening into
-otomy	cutting into / dividing / incision
-para	given birth
-pathy	disease
-penia	lack of / decreased
-pexy	fixation of
-phagia	swallowing
-phasia	speech
-philia	liking / loving / affinity for
-phobia	irrational fear
-phylaxis	protection / prevention
-plasia	formation
-plasty	form / mould / reconstruct
-plegia	paralysis

Suffix	Meaning
-pnoea	breathing
-porosis	Thinning / passage
-ptosis	drooping / falling
-rrhythmia	rhythm
-sclerosis	hardening
-scope	lighted instrument used to examine
-spasm	Involuntary contraction of
-stasis	cessation of movement / flow
-staxis	dripping
-stenosis	narrowing
-tome	cutting instrument
-tripsy	crushing
-trophy	nourishment / food
-uria	condition of urine

Appendix 2 Human body systems – Level 2 Medical terminology

The learner should be able to identify and give definitions of terms relating to:

Skeletal/locomotor system

- The skeleton:
  - skull (main bones)
  - cranium
  - face bones (main)- maxilla, mandible
  - nasal.
- Vertebrae – atlas, axis, cervical, thoracic, lumbar, sacral, coccyx, thorax - rib cage, sternum.
- Appendicular:
  - scapula, clavicle
  - pelvis.
- Extremities -humerus, radius, ulna, carpals, metacarpals, phalanges, femur, tibia, fibula, patella, tarsals, metatarsals.
- Diseases, disorders and conditions of the skeletal/locomotor system
- Medical procedures, diagnostic tests and equipment used with this body system.

Blood and cardiovascular system

Blood

The learner should be able to identify and give definitions of terms relating to:

- Individual blood cells
  - erythrocytes
  - leucocytes (phagocytes)
  - lymphocytes
  - thrombocytes / platelets.
- Plasma / serum.
- Diseases, disorders and conditions of the blood.
- Medical procedures, diagnostic tests and equipment used with this body system.

Cardiovascular system

- The heart structures:
  - pericardium
  - myocardium
  - endocardium,
  - heart chambers - atria, ventricles

- Types of blood vessels
  - major blood vessels:
    - arteries – aorta
    - veins – venae cavae
  - minor blood vessels: capillaries.
- Diseases, disorders and conditions of the cardiovascular system.
- Medical procedures, diagnostic tests and equipment used with this body system.

Lymphatic and immune system including **body's response to infection**

- Lymphatic structures
  - lymph / tissue fluid
  - vessels
  - ducts
  - nodes (glands)
  - specialised lymph glands ie spleen, tonsils, adenoids.
- Processes of infection and body's response.
- Diseases, disorders and conditions of the lymphatic system.
- Medical procedures, diagnostic tests and equipment used with this body system.

Respiratory system

- Upper respiratory tract structure:
  - nose, pharynx, epiglottis, larynx, trachea.
- Lower respiratory tract structure:
  - lungs - bronchi, bronchioli, alveoli
  - pleura.
- Thoracic cavity, diaphragm.
- Diseases, disorders and conditions of the respiratory system.
- Medical procedures, diagnostic tests and equipment used with this body system.

Digestive system

- Structures of the digestive system:
  - mouth
  - salivary glands
  - pharynx
  - oesophagus
  - stomach:
  - small intestine
  - large intestine.
- Accessory organs of digestion: teeth, tongue, gums salivary glands, pancreas, liver, gallbladder.
- Diseases, disorders and conditions of the digestive system and accessory organs of digestion.
- Medical procedures, diagnostic tests and equipment used with this body system**.**

Urinary

- Structures of the urinary system:
  - kidney and its regions – renal pelvis
  - ureters
  - bladder
  - urethra.
- Diseases, disorders and conditions of the urinary system.
- Medical procedures, diagnostic tests and equipment used with this body system.

Reproductive (male and female including obstetrics)

- Male reproductive system:
  - testes
  - scrotum
  - epididymis
  - penis
  - prostate gland
  - urethra
  - perineum.
- Diseases, disorders and conditions of the male reproductive system.
- Medical procedures, diagnostic tests and equipment used with this body system.

- Female reproductive system and obstetrics:
  - ovary
  - fallopian (uterine) tubes
  - uterus
  - cervix
  - vagina
  - perineum
  - vulva.
- Assessory organs – breast.
- Menstruation.
- Structures and stages of pregnancy including development of fertilized egg:
  - embryo
  - fetus – placenta.
- Diseases, disorders and conditions of the female reproductive system and obstetrics.
- Medical procedures, diagnostic tests and equipment used with this body system.

Appendix 3 Medical specialities – Level 2 Medical terminology

Term	Meaning
	Study of the conditions, disease and treatment of:
Anaesthesiology	Study of speciality concerning control of sensation and resuscitation
Bariatrics	Reduction of stomach capacity for treatment of obesity
Cardiology	The heart and blood vessels
Dermatology	The skin
Endocrinology	Endocrine system ie hormones and ductless glands
Gastroenterology	Digestive system
Genitourinary	Urinary and male reproductive system
Geriatrics	Elderly / old people
Gynaecology	Female reproductive system
Haematology	Blood
Hepatology	Liver
Immunology	The immune ie defence system of the body
Nephrology	The urinary system including the kidney
Neurology	The nervous system
Obstetrics	Pregnancy and childbirth
Oncology	Tumours including cancer
Ophthalmology	Eyes
Orthopaedics	Locomotor system / bones and joints
Otorhinolaryngology	Ear nose and throat
Plastic surgery	Reshaping body parts / skin
Paediatrics	Children
Psychiatry	Mental illness
Rheumatology	Connective tissue
Urology	The urinary system
Venereology	Sexually transmitted disease
	Miscellaneous
Cytology	Microscopic study of cells
Bacteriology	Microscopic study of bacteria ie a classification of microorganisms
Biochemistry	Study of the chemical contents and processes of the body
Forensic pathology	Study of criminal investigation concerning disease / death
Histology	Microscopic study of tissues
Histopathology	Microscopic study of disease of tissues

Microbiology	Microscopic study of microorganisms (too small to be seen unless under a microscope)
Pathology	Study of disease; its effects and causes
Pharmacology	Drugs and their effects
Physiotherapy	Treatment with natural, physical means as opposed to drugs eg exercise, massage
Psychology	Study of the mind and behaviour
Radiology	Study of the use of X-rays in diagnosis and treatment
Virology	Study of viruses

Appendix 4 Pharmaceutical abbreviations – Level 2 Medical terminology

Abbreviation ***Prescription directions**	**Meaning**
ac	Before food
bd	Twice daily
od	Every day
om	Every morning
on	Every night
pc	After food
prn	When required / whenever necessary
qds	Four times daily
qqh	Every four hours
stat	At once / immediately
tds	Three times daily
tid	Three times daily
Modes of administration and units of measurement	
im or i / m or IM	Intra-muscular
iv or i / v or IV	intravenous
g	gram
mcg (not used in prescriptions)	microgram
mg	milligram
ml	millilitre
L or l	litre
Miscellaneous	
BNF	British National Formulary
BP	British Pharmacopoeia
MIMS	Monthly index of medical specialities
NP	Proper name / named
OTC	Over the counter
rep	Repeat / let it be repeated
R_x	Take / recipe / treatment
SI	International System (of measurement)
TTA	To take away

Legal classification	
CD / cd	Controlled drug
GSL	General Sales List
P	Pharmacy only
POM	Prescription only medicine
MODA	Misuse of Drugs Act
Types of drugs	
HRT	Hormone replacement therapy
NSAID	Nonsteroidal anti-inflammatory drug
PPI	Proton pump inhibitor

*Candidates will only be tested on the approved abbreviations in the BNF (as stated in the assessment criteria). Centres may teach common variations eg bid, qid but these will **not** be tested.

Unit 266 Administration skills in a medical environment

UAN:	**H/505/1249**
Level:	2
Credit value:	8
GLH:	64
Aim:	The aim of this unit is to enable the learner to understand medical administrative procedures, including registration of patients, appointments and appointment systems, the use of office equipment, how to deal with post, filing and repeat prescribing. In addition, they will gain an understanding of how to manage their own workload and the importance of accuracy in the medical environment.

Learning outcome
The learner will: 1. Understand how to manage own work in a medical environment.
Assessment criteria
The learner can: 1.1 describe how to manage own work 1.2 describe the **use** of a **diary** in a medical environment 1.3 explain different types of **reminder systems**.

Range
Diary Manual and electronic. **Use** Forecasting, record-keeping, evidence of work done using task manager, reminder of forthcoming events. **Reminder systems** Bring forward, tickler system, electronic.

Learning outcome
The learner will: 2. Understand the need for accurate record keeping in a medical environment.
Assessment criteria
The learner can: 2.1 explain the **importance** of accurate record keeping 2.2 describe the different types of **records** that a medical administrator may work with 2.3 describe how the medical administrator can ensure that records are accurate 2.4 describe the use of **patient information systems** in a medical environment.

Range
Importance Easy to follow, accurate records will contribute to the success of the practice, saves time and effort, enhances patient care. **Records** Paper, electronic. **Patient information systems** PAS, HISS.

Learning outcome
The learner will: 3. Understand primary and secondary care registrations.
Assessment criteria
The learner can: 3.1 explain the **procedure** for patient registration in primary and secondary care 3.2 explain the main **features** of a patient's **record**.

Range
Procedure • Primary care Eligibility (geographical proximity, UK resident – temporary / permanent), documentation (temporary and permanent), essential medication, new patient screening, acceptance / refusal. • Secondary care Eligibility (geographical proximity, UK resident – temporary / permanent),documentation (temporary and permanent, patient record).

Features

- Primary care

Unique, follows the patient throughout their life, shows the patient's names, demographic details, previous illnesses including significant episodes in the lives.

- Secondary care

Records remain with the hospital, an individual may have hospital records at more than one hospital, records divided into at least five sections (patient's information, medical section, nursing section, correspondence, results).

Record

In primary care: Lloyd George, A4, electronic.

In secondary care: A4, electronic.

Learning outcome
The learner will: 4. Understand medical appointment systems.
Assessment criteria
The learner can: 4.1 describe the main features of **appointment systems** 4.2 describe the **benefits** of medical appointment systems 4.3 describe the different **access routes** in secondary care.

Range
Appointment systems In primary and secondary care. **Benefits** Save time for patients and health professionals, reduce cross-infection, aid planning, reduce stress. **Access routes** Referral from GP to consultant, via A&E, via NHS Direct or via walk in centres or national alternative.

Learning outcome
The learner will: 5. Understand the principles of repeat prescribing.
Assessment criteria
The learner can: 5.1 describe the **safe procedure** for issuing repeat prescriptions 5.2 explain the **methods** of storing unused prescription pads and completed prescriptions to prevent misuse of drugs.

Range
Safe procedure Checking the patient's details (full name, date of birth, address) against medical records, checking review dates, checking spelling of medication, checking correct dosage with medical records, verify the patient's details when handing out prescriptions. **Methods** Ensure unused prescription pads are locked away when not in use, completed prescriptions are kept out of sight and reach of patients and locked away when the surgery is closed.

Learning outcome
The learner will: 6. Understand general administrative duties in a medical environment.
Assessment criteria
The learner can: 6.1 describe how patient confidentiality is maintained when using a fax machine or an email 6.2 describe the procedure for dealing with **mail** 6.3 describe different types of **filing systems** 6.4 describe the use of an NHS Trust intranet.

Range
Mail Incoming and outgoing, general, confidential, parcels. **Filing systems** Alphabetical, numerical, chronological, geographical, subject, terminal digit.

Learning outcome
The learner will: 7. Understand what constitutes a team.
Assessment criteria
The learner can: 7.1 define a **team** 7.2 explain what constitutes an effective team.

Range
Team A group of people with complementary skills working together for a common goal.

Unit 266 Administration skills in a medical environment

Supporting information

Guidance

Learning outcome 2

Understand that the records the administrator / receptionist is involved with will be used for funding in general practice (the learner does not need to understand the actual funding process), demographics for medical audit, and for financial audit, and that accuracy is vital

Learning outcome 3

For registration in primary care the patient needs to complete personal details on form GMS1

Unit 267 Communication skills in a medical environment

UAN:	**T/505/1255**
Level:	2
Credit value:	6
GLH:	50
Aim:	The aim of this unit is to equip the learner with the knowledge and skills to be able to communicate appropriately with a range of people in a medical environment. It enables the learner to understand the importance of the non-verbal as well as verbal aspects of communication, to understand what factors may make communication difficult and how to adapt communication in these situations. It will also equip the learner with the knowledge of how to use the telephone confidentially, in accordance with the special requirements of a medical environment, as well as develop skills on composing appropriate written documents.

Learning outcome
The learner will: 1. Understand the importance of interpersonal skills in a medical environment.
Assessment criteria
The learner can: 1.1 describe **face to face communication** 1.2 describe **ways** of promoting a professional image in the medical environment 1.3 describe how to **adapt** communication to **difficult situations**.

Range
Face to face communication Speaking, listening, non-verbal; importance of non-verbal communication and reading non-verbal signs and signals. **Ways** Smile, greeting, level of eye contact, suitable tone, pace, clarity, volume, ensuring confidentiality of the conversation, full concentration, active listening, open body posture, control of gestures, building and maintaining rapport.

Adapt

Calm manner, slower, quieter speech, addressing the person by name (confidentiality permitting), empathic listening, checking information carefully, not giving too much information at once, explaining specialist or medical terms, knowing when to summon a colleague's help.

Difficult situations

Conditions which make communication problematic: people with specific needs.

Physical barriers – room layout, desks, screens and partitions, computers, distractions, distances, noise, silence.

Learning outcome
The learner will: 2. Understand telephone techniques in a medical context.
Assessment criteria
The learner can: 2.1 describe the telephone **techniques** used in a medical environment 2.2 identify the **key facts** needed when taking telephone messages 2.3 explain the **methods** of maintaining confidentiality while using the telephone.

Range
Techniques Positive, clear greeting with house style applied; checking details, use of telephone alphabet, questioning to gather information (when, who, what, how and where), active listening and ways of communicating understanding; summarising and agreeing action, pausing to allow the caller to complete the call; closing the call. Adapting communication: voice tone and pitch, pace, avoiding fade, smile in voice to convey warmth, natural rather than forced. **Key facts** Date, time, caller's name and contact details, actions required, urgency, message taken by, message for. **Methods** Efficient checking and confirming but avoiding echo technique or repetition of patient / confidential details; confirming through the use of 'yes' or 'fine', repeating only dates and times and medical staff details; using a suitable voice level; correct use of answerphones; leaving minimal details of name and number only.

Learning outcome
The learner will: 3. Understand diversity and its effects on work in a medical environment.
Assessment criteria
The learner can: 3.1 explain the concept of **unconditional positive regard** 3.2 describe **methods** of communicating with people with **special requirements** 3.3 explain the **importance** of **cultural information** in communication and patient care.

Range
Unconditional positive regard Giving good service irrespective of personal feelings and prejudice, avoiding over-familiarity, showing respect to patients, visitors and colleagues irrespective of race, sex, age, sexuality, religion, disability and also factors like personal hygiene, size, lifestyle habits. **Methods** Combining methods of communication, minicom, Braille, BSL, Makaton. **Special requirements** Visually impaired, hearing impaired, the elderly, learning needs, language needs. **Importance** Avoiding misunderstanding, administrative errors and personal offence; maintaining consistent service and communication standards; understanding patient requests and behaviour. **Cultural information** Dress, diets, festivals, religious calendar, naming systems, attitudes to the opposite sex.

Learning outcome
The learner will: 4. Understand the use of different forms of electronic and written communication within a medical environment.
Assessment criteria
The learner can: 4.1 describe the use of **electronic communication** 4.2 describe the **principles** of producing **written communication**.

Range
Electronic communication Fax, text message, pager and e-mail. **Principles** Consideration for reader's needs, design and layout conventions, house style, clarity, courtesy, positive impression and business-like tone in documents, confidentiality. **Written communication** Fax, email, written message, skeleton letter / template, letter from notes, fact sheet, notice, notes.

Learning outcome
The learner will: 5. Be able to use different forms of electronic and written communication within a medical environment.
Assessment criteria
The learner can: 5.1 select an appropriate **form** of written and electronic communication for specific situations 5.2 **produce documentation** from notes or brief instructions using appropriate format.

Range
Form Fax, written message, text message, pager and e-mail. **Produce** Use appropriate formats, produce draft documents using a conventional layout, produce clear and accurate documents which convey the message, show the use of courtesy and business-like tone in documents. **Documentation** Fax, email, message, skeleton letter / template, letter from notes, fact sheet, notice, notes.

Unit 268 Working in the National Health Service

UAN:	**D/505/1248**
Level:	2
Credit value:	9
GLH:	57
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 outcome
The learner will: 1. Understand the structure of the NHS
Assessment criteria
The learner can: 1.1 identify the current organisations that form the structure of the National Health Service.

Learning outcome
The learner will: 2. Understand primary and secondary care.
Assessment criteria
The learner can: 2.1 describe the services available from **key primary care providers** 2.2 identify **key staff** employed in the NHS 2.3 describe the job roles of **key staff** employed in the NHS 2.4 describe the services provided by the **key departments** in secondary care.

Range
Key primary care providers General Practitioners, Pharmacists, Opticians, Dentists, NHS Direct (England / Wales), NHS 24 (Scotland), NHS Walk-In Centres. **Key staff** • Primary GP, Practice Nurse, Community / District Nurse, Midwife, Practice. • Secondary Consultant, Registrar, Junior Doctor, Sister / Charge Nurse, Staff Nurse, general Nurse, Physiotherapist, Occupational Therapist, Radiographer, administrative staff. **Key departments** Radiology, Oncology, Orthopaedics, Cardiology, Accident and Emergency (A&E), Gastroenterology.

Learning outcome
The learner will: 3. Understand community based social care.
Assessment criteria
The learner can: 3.1 identify the various types of **community based social care** 3.2 identify the range of **people** who could benefit from social care 3.3 describe the role of the **key professionals** who provide social care.

Range
Community based social care Care homes, sheltered accommodation, residential homes, community care workers. **People** Families and children, adolescents, disabled, elderly, drug offenders, youth offenders, asylum seekers, adults and children with mental health problems. **Professionals** Social Workers, Community Psychiatric Nurse (CPN), Support Workers.

Learning outcome
The learner will: 4. Understand key workplace legislation regarding employment.
Assessment criteria
The learner can: 4.1 state the purpose of a written contract of employment 4.2 identify the terms of a written contract of employment 4.3 explain the current discrimination legislation 4.4 describe the workplace **grievance procedure** 4.5 identify possible **grounds** for a workplace grievance.

Range
Grievance procedure Informal / formal complaint to manager, discussion, investigation, written complaint, role of HR, conciliation. **Grounds** Discrimination, bullying, harassment.

Learning outcome
The learner will: 5. Understand the importance of personal development in the workplace.
Assessment criteria
The learner can: 5.1 explain the **Personal Development Review (PDR)** process 5.2 explain the purpose of continuous professional development (CPD) 5.3 describe the **ways** in which the NHS employee can enhance their skills in the workplace.

Range
Personal Development Review (PDR) A joint review between the employee and their line manager and constructive feedback will be delivered. Training needs will be identified. Yearly review process which both the employee and manager need to prepare for. **Ways** Internal training courses, secondments, mentoring and coaching.

Learning outcome
The learner will: 6. Understand how to maintain health and safety in the workplace.
Assessment criteria
The learner can: 6.1 outline the current health and safety **legislation** 6.2 describe how to maintain a safe working environment.

Range
Legislation HASAWA, RIDDOR, Health & Safety (Display screen equipment) Regulations, COSHH.

Learning outcome
The learner will: 7. Understand how to maintain and protect the rights of the patient.
Assessment criteria
The learner can: 7.1 identify key **patient rights** 7.2 explain types of **consent** 7.3 outline the current **legislation and regulations** governing patient confidentiality 7.4 explain how to maintain patient confidentiality 7.5 identify consequences of breaching patient confidentiality 7.6 describe the current NHS complaints procedure 7.7 explain the role of the administrator in dealing with the complaints.

Range
Patients' rights As outlined in the NHS Constitution. **Consent** Express consent - written consent for all major diagnostic procedures Implied consent - by presenting oneself at a surgery or outpatient department implies that one is agreeable to examination Informed consent – patient must have a clear understanding of the facts and the implications of going ahead with (or not) the treatment / procedure. **Legislation and regulations** Data Protection Act 1998 Caldicott Guidelines Freedom of Information Act 2000.

Unit 268 Working in the National Health Service

Supporting information

Guidance

Learning outcome 4

Terms and purpose of a written contract of employment:

- Commencement
- Term
- Job title and duties
- Place of work
- Hours of work
- Pay
- Holiday entitlement
- Pension
- Sickness absence
- Termination of contract
- Notice periods on both sides
- Disciplinary, dismissal and grievance procedures.

The purpose of the contract is to protect the employee and the employer, the employee is entitled to a written contract of employment within two months of starting work.

Unit 269 Work experience in a medical environment

UAN:	**A/505/1256**
Level:	2
Credit value:	5
GLH:	40
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.

Learning outcome
The learner will: 1. Be able to communicate with other people in a medical environment.
Assessment criteria
The learner can: 1.1 **listen actively** to information that **other people** are communicating 1.2 **provide** accurate, clear and structured information to meet the needs of other people 1.3 use positive verbal and non-verbal communication when dealing with other people 1.4 use the telephone in a professional manner.

Range
Listen actively Ask questions to clarify and check information. **Other people** Manager / supervisor, work colleague, medical staff (doctor, nurse or diagnostic staff), patients and their carers. **Provide** Face-to-face oral communication; written communication (notes, email, letter, message); using existing resources (leaflets, forms / templates, intranet, diary).

Learning outcome
The learner will: 2. Understand the medical organisation / setting in which they work.
Assessment criteria
The learner can: 2.1 describe the organisation's function and purpose 2.2 explain how the organisation links with other organisations and healthcare facilities 2.3 describe own team and its role within the organisation 2.4 describe how own role contributes to the organisation.

Learning outcome
The learner will: 3. Be able to contribute to teamwork.
Assessment criteria
The learner can: 3.1 work in a way that **supports** their medical team and its objectives 3.2 recognise own strengths and development needs.

Range
Supports Agree objectives with the people they work with, take responsibility for own work, prioritise tasks and manage own time, keep other people informed about own progress, complete work to, agreed standards and timescale, respond to feedback from colleagues.

Learning outcome
The learner will: 4. Be able to follow organisational requirements.
Assessment criteria
The learner can: 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.

Range
Requirements Legal requirements and codes of practice. **Policies, systems and procedures** Health and safety, employment protocols (signing in, attendance, security), house style, telephone procedures, use of resources.

Unit 269 Work experience in a medical environment

Supporting information

Guidance

Work experience is a valuable learning opportunity and candidates should use the work experience unit as a way of improving their employability. It is also advantageous for candidates already in post in a health care environment as a means of broadening experience and developing a new career direction.

Hours

To complete this unit, candidates should be allocated a work placement of 5 days or 30 hours. This can be on a part or full-time basis. It is not necessary to complete the work experience in a single block; small blocks of time or more flexible arrangements may be preferable to candidates and their placement providers.

Medical environments

Work placements should be undertaken in a medical environment, where candidates have experience of patient contact, handling medical records, utilising communication skills and observing appointment procedures. Where primary care or secondary care placement proves difficult, other healthcare settings will be acceptable. Wherever they are placed, it is important that candidates understand the purpose of the organisation and how it is connected to local healthcare provision.

Possible healthcare settings / organisations:

• Ambulance Control Centres • Community Healthcare Services • Day centres for those with learning or physical disabilities or elderly persons • Dental Practices • Elderly Care Units • Family Planning Clinics • General Medical Practices • Health Education Departments • Hospices	• NHS Hospitals • Nursing Homes • Opticians • Outreach Clinics • Pharmacies • Private Hospitals • Specialist and diagnostic Clinics • Well Woman Clinics • Well Man Clinics

Guidelines for the placement organiser and provider

It is recognised that work experience providers have a valuable role in supporting candidates towards their diploma. The time spent on placement puts their college work into perspective and helps develop professionalism. Before embarking on a placement, all candidates will need to be fully briefed by their tutors so that they understand their role and work only within the remit of their responsibility.

Whilst on placement, candidates must be made aware of the organisation's regulations with respect to confidentiality and security of information. Candidates should also receive initial guidance on workplace standards relating to punctuality, reliability, accuracy, dress code and general performance as well as the health and safety and security procedures to follow.

A high standard of professionalism will be expected of the candidates and the most important aspect is that confidentiality is maintained.

Areas of work

Access to the following areas of work will enhance the candidate's skills development and will help the candidate achieve the four learning outcomes for this unit:

• Reception duties; greeting visitors and patients face to face; verbal and non-verbal communication • Telephone procedures and skills; development of a confident professional telephone manner • Understanding appointment systems, booking appointments, transmission of accurate messages • Filing and retrieval of patients' notes, correspondence, medical records; use of the organisation's computerised and paper-based filing systems	• IT systems • Use of diaries and planners either paper-based or computerised • Working relationships - both one-to-one and working as part of a wider team; contact with a range of key professionals

Work in these additional areas will support the candidate's learning and enhance their experience:

- Using IT Skills, data input and word-processing.
- Using a range of equipment and resources.
- Dealing with post, patient information and displays.
- Observation / assistance with clinic reception and administration.

Guidelines for candidates

Detailed guidelines for candidates are published in the 5519 Assessment guide available from the City & Guilds website. Tutors should provide a copy of the guidelines to each candidate.

Assessment

The work experience unit is assessed through a mini portfolio of evidence based on the candidate's work placement; full details are contained in the 5519 Assessment guide.

Candidates already working within a medical environment can choose to base their evidence on either their main work role or on their work placement.

Unit 270 Medical word processing

UAN:	**J/505/1258**
Level:	2
Credit value:	9
GLH:	60
Aim:	The aim of this unit is to enable learners to develop the knowledge and skills to accurately produce routine professional documents for the medical environment. They will learn how to interpret relevant information and use a range of word processing techniques to edit, format and print a range of standard documents that are common in a medical environment. Learners will also use mail merge functions to combine information from a data file and produce standard letters. They will also learn the importance of proofreading and how to use appropriate checking methods to produce accurate documents.

Learning outcome
The learner will: 1. Be able to manage electronic files in a medical environment.
Assessment criteria
The learner can: 1.1 create and name folders 1.2 create and save **documents** in named folders 1.3 recall, rename and save **electronic files** in named folders.

Range
Documents Medical reports, medical referral letters, appointment letters, clinic letters, discharge letters, operation lists, notices, information leaflets. **Electronic files** Letterheads, notices, information leaflets.

Learning outcome
The learner will: 2. Be able to use word processing functions to format and present medical documents.
Assessment criteria
The learner can: 2.1 input different **types of information** from handwritten and typewritten drafts 2.2 use appropriate formatting techniques to present medical documents 2.3 expand general abbreviations 2.4 follow written instructions and **standard printers' correction** signs to **edit** text 2.5 create and **format tables** within documents 2.6 complete work within set timescales.

Range
Types of information Text / numbers, references, dates, headings (main, subject, implied headings containing patient details), medical terminology, special marks (such as urgent, private, confidential, for the attention of), indicate enclosures, indicate copy letters. **Formatting techniques** Emphasise headings (embolden, capitals, italics, underline), change font style and size, paragraphs with numbered or bullet points, portrait and landscape orientation, insert headers and footers, add / remove page breaks, adjust margins, align text (left, right, fully justified), change line spacing, place and resize images, indicate routing on letters, insert page numbers, insert symbols. See Appendix 5. **Medical documents** Medical reports, medical referral letters, appointment letters, clinic letters, discharge letters, operation lists, notices, information leaflets. **General abbreviations** See Appendix 5. **Standard printers' correction signs** See Appendix 5. **Edit text** Insert, delete, transpose, copy, move and paste text within a document, sort data (into alphabetical, numerical, chronological order). **Format tables** Use column headings, merge cells, adjust column width, align column content (left, right, centre), transpose columns.

Learning outcome
The learner will: 3. Be able to use mail merge functions.
Assessment criteria
The learner can: 3.1 recall **medical documents** and insert variable merge codes 3.2 **update** an existing data file 3.3 combine and merge information using single criteria into a document.

Range
Medical documents Appointment letters, screening invitations. **Update** Add, amend and delete records.

Learning outcome
The learner will: 4. Be able to proofread and correct errors in medical documents.
Assessment criteria
The learner can: 4.1 check documents for **accuracy** 4.2 identify and correct **errors** in medical documents.

Range
Accuracy Following instructions, checking work for errors. **Errors** Typographical, spelling including medical terminology, grammatical, punctuation, presentation, consistency.

Learning outcome
The learner will: 5. Be able to print medical documents.
Assessment criteria
The learner can: 5.1 use appropriate **methods** to check documents before printing 5.2 produce screen shots 5.3 print **final copies** of documents as instructed.

Range
Methods Spell checker, print preview facilities, grammar and thesaurus facilities, English and mother tongue dictionaries, medical and drug dictionaries, online dictionaries. **Final copies** Letters indicating routing, data file, merged documents, document showing merge codes, screen shots showing files and folders, single and multiple-page documents.

Appendix 5 Abbreviations, spelling, amendment and correction signs, symbols and special characters - Medical word processing

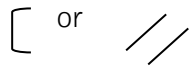
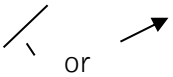
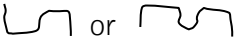
General Abbreviations

You should be able to expand the following abbreviations and spell the words accurately:

abbreviation	spelling
AOB	any other business
approx	approximately
appt(s)	appointment(s)
asap	as soon as possible
dept(s)	department(s)
immed	immediate(ly)
info	information
misc	miscellaneous
necy	necessary
opp(s)	opportunities
poss	possible
pt	patient
recd	received
yr(s)	year(s)
yr(s)	your(s)
days of the week:	eg Mon, Tues
months of the year	eg Jan Feb
words in addresses	eg Rd St Ave Dr Sq Cresc Pl Pk
complimentary closes	eg ffly sincly

All abbreviations will be shown in the typewritten or handwritten draft as open punctuation, unless they appear at the end of a sentence or are followed by actual punctuation marks.

You should be able to distinguish between words that are often confused eg			
affect / effect	are / our	complement / compliment	dependant / dependent
enquiry / inquiry	ensure / insure	practice / practise	to / too
their / there			
and identify how to use the apostrophe for omission and possession eg			
it is –**it's** not true it has – **it's** happened twice you/we/they are – **you're/we're/they're** welcome they/we have – **they've/we've** arrived early		it – the dog wagged **its** tail singular noun – the **girl's** dogs plural noun – the **girls'** dogs plural noun that doesn't end in 's' – the **men's** hats	

Amendment and correction signs			
New paragraph		close up	
run on		leave a space	
insertion (with word above or balloon with arrow)		Let it stand (stet)	in margin
transpose horizontally or balloon with arrow		underscore ie underline	u/s
transpose vertically		lower case	l/c
upper case ie capital letter(s)	u/c		

Punctuation			
Punctuation marks used may include:			
colon	**:**	full stop	**.**
semi-colon	**;**	question mark	**?**
hyphen (no space either side)	**-**	exclamation mark	**!**
dash (one space either side)	**-**	brackets	**( )**
apostrophe	**'**	asterisk	*****
inverted commas	**" "**	oblique	**/**
comma	**,**	ampersand	**&**

Symbols and special characters (Please note this list is not exhaustive, these are examples only)	
Accents	è, à
Symbols and special characters	£, @, %, °, ©

Unit 271 Production of medical documents from recorded speech

UAN:	**L/505/1259**
Level:	2
Credit value:	6
GLH:	40
Aim:	The aim of this unit is to enable learners to develop the knowledge and skills to use audio equipment and software in order to produce a range of routine and professional medical documents. They will learn the techniques to transcribe recorded speech of a routine nature and containing medical terminology. Learners will learn how to interpret relevant information and use a range of word processing techniques to produce, format and print documents that are common in a medical environment. Learners will also learn the importance of proofreading their work and how to use appropriate checking methods to produce accurate and professional documents.

Learning outcome
The learner will: 1. Be able to manage electronic files in a medical environment.
Assessment criteria
The learner can: 1.1 create and save **documents** 1.2 recall, rename and save documents 1.3 recall files containing recorded speech for transcribing.

Range
Documents Clinic letters, screening invites, medical referral letters, discharge letters, notices / leaflets / information sheets, letterheads, containing medical terminology, screenshot, letters to patients.

Learning outcome
The learner will: 2. Be able to produce professional medical documents from recorded speech.
Assessment criteria
The learner can: 2.1 key in **information** from recorded speech and written instructions 2.2 select **stationery** appropriate to the document type 2.3 use the **functions** of audio software and **equipment** to transcribe **documents** 2.4 create and format **tables** 2.5 use appropriate **formatting techniques** to present medical **documents** 2.6 check documents for **accuracy** 2.7 complete work within set timescales.

Range
Information Text / numbers, references, dates, headings (main, subject, implied headings containing patient details), special marks (such as urgent, private, confidential, for the attention of), indicate enclosures, show routing of letters, generic and brand names of drugs. **Stationery** Pre-stored templates (eg letterheads), plain paper. **Functions** Controls (speed, voice, playback, fast-forward, rewind). **Equipment** Pedals, earphones / headsets. **Documents** Medical reports, clinic letters, screening invites, medical referral letters, discharge letters, operation lists, notices / leaflets, letterheads, containing medical terminology. **Tables** 3-column table, column headings, text, numbers, adjust column width, gridlines. **Formatting techniques** Emphasise headings (emboldening, capitals, italics, underline), change font style and size, paragraphs with numbers or bullet points, portrait and landscape orientation, insert headers and footers, adjust margins, align text (left, right, centre, fully justified), change line spacing, insert symbols. **Accuracy** Spellings including medical terminology, generic and brand names of drugs.

Learning outcome
The learner will: 3. Be able to print medical documents.
Assessment criteria
The learner can: 3.1 use appropriate **methods** to check documents before printing 3.2 print **final copies** of documents as instructed.

Range
Methods Spell checker, print preview facilities, grammar and thesaurus facilities, English and mother tongue dictionaries, medical and drug dictionaries, online dictionaries. **Final copies** Letters indicating routing, single-page documents, screenshot showing files.

Unit 272 Database software

UAN:	**M/502/4555**
Level:	2
Credit value:	4
GLH:	30
Relationship to NOS:	This unit is based on the Level 2 National Occupational Standards for IT users.
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.

Learning outcome
The learner will: 1. Create and modify non-relational database tables.
Assessment criteria
The learner can: 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.

Learning outcome
The learner will: 2. Enter, edit and organise structured information in a database.
Assessment criteria
The learner can: 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.

Learning outcome
The learner will: 3. Use database software tools to run queries and produce reports.
Assessment criteria
The learner can: 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 302 Contribute to the improvement of business performance

UAN:	**D/506/1911**
Level:	3
Credit value:	6
GLH:	33
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAH122 Assist in improving organisational performance.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to contribute to the improvement of business performance. Upon completion of this unit, learners will have developed an understanding of the key principles associated with resolving business problems and an understanding of improvement techniques and processes. Learners will be able to apply this knowledge when solving problems in business and when contributing to the improvement of business activities.

Learning outcome
The learner will: 1. Understand the principles of resolving business problems.
Assessment criteria
The learner can: 1.1 explain the use of different problem-solving **techniques** 1.2 explain the organisational and legal constraints relating to problem-solving 1.3 describe the role of stakeholders in problem-solving 1.4 describe the steps in the business **decision-making process** 1.5 analyse the implications of adopting recommendations and implementing decisions to solve business problems.

Assessment Guidance
Techniques: • PEST analysis • risk analysis • failure modes and effects analysis • cause and effect analysis **Decision-making process:** Decision Matrix Analysis (also known as – Grid Analysis). **Evidence may be supplied by:** • report • professional discussion • questioning

Learning outcome
The learner will: 2. Understand improvement techniques and processes.
Assessment criteria
The learner can: 2.1 describe the purpose and benefits of continuous improvement 2.2 analyse the: a. features b. use c. constraints of different continuous improvement techniques and **models** 2.3 explain how to carry out a **cost-benefit analysis** 2.4 explain the importance of feedback from customers and other **stakeholders** in continuous improvement.

Assessment Guidance
Models: • Crosby's 14 steps • Kaizen model **Cost-benefit analysis:** Adding up the benefits of a course of action, comparing these with costs associated. **Stakeholders:** Anyone who has an interest in the process/product. **Evidence may be supplied by:** • report • professional discussion

Learning outcome
The learner will: 3. Be able to solve problems in business.
Assessment criteria
The learner can: 3.1 identify the: a. nature b. likely cause c. implications of a problem 3.2 evaluate the scope and scale of a problem 3.3 analyse the possible courses of action that can be taken in response to a problem 3.4 use evidence to justify the approach to problem-solving 3.5 develop a plan and success criteria that are appropriate to the nature and scale of a problem 3.6 obtain approval to implement a solution to a problem 3.7 take action to resolve or mitigate a problem 3.8 evaluate the degree of success and scale of the implications of a solved problem.

Assessment Guidance
Evidence may be supplied by: • report • professional discussion • questioning

Learning outcome
The learner will: 4. Be able to contribute to the improvement of activities.
Assessment criteria
The learner can: 4.1 identify the: a. nature b. scope c. scale of possible contributions to continuous improvement activities 4.2 measure changes achieved against existing **baseline data** 4.3 calculate performance measures relating to: a. cost b. quality c. delivery 4.4 justify the case for adopting improvements identified with evidence 4.5 develop standard operating procedures and resource plans that are capable of implementing agreed changes.

Assessment Guidance
Baseline data: Initial collection of data which serves as a basis for comparison with the subsequently acquired data. **Evidence may be supplied by:** • product • report • professional discussion • questioning.

Unit 302 Contribute to the improvement of business performance

Supporting information

Guidance

Whilst working through this unit, any report at this level would need to be in excess of 500 words. The report can be holistic and supported by other methods of evidencing ie observation report, product etc.

Unit 303 Negotiate in a business environment

UAN:	**H/506/1912**
Level:	3
Credit value:	4
GLH:	18
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAG124 Negotiate in a business environment.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to negotiate in a business environment and introduces learners to the principles underpinning negotiation. Upon completion of this unit, learners will be able to prepare for business negotiations and carry out business negotiations.

Learning outcome
The learner will: 1. Understand the principles underpinning negotiation.
Assessment criteria
The learner can: 1.1 describe the requirements of a negotiation **strategy** 1.2 explain the use of different negotiation **techniques** 1.3 explain how research on the other party can be used in negotiations 1.4 explain how cultural differences might affect negotiations.

Assessment Guidance
Strategy: • plan • tactic • approach **Techniques:** • 'The Persuasion Tools Model' • Win-Win • 'Lewicki & Hiam' **Evidence may be supplied by:** • report • professional discussion • questioning

Learning outcome
The learner will: 2. Be able to prepare for business negotiations.
Assessment criteria
The learner can: 2.1 identify the: a. purpose b. scope c. objectives of the negotiation 2.2 explain the scope of their own authority for negotiating 2.3 prepare a negotiating strategy 2.4 prepare **fall-back stances** and compromises that align with the negotiating strategy and priorities 2.5 assess the likely objectives and negotiation stances of the other party 2.6 research the strengths and weaknesses of the other party.

Assessment Guidance
Fall-back stances: Eg A last ditch compromise. **Evidence may be supplied by:** • report • product • professional discussion • questioning

Learning outcome
The learner will: 3. Be able to carry out business negotiations.
Assessment criteria
The learner can: 3.1 carry out negotiations within responsibility limits in a way that optimises opportunities 3.2 adapt the conduct of the negotiation in accordance with changing circumstances 3.3 maintain accurate records of: a. negotiations b. outcomes c. agreements made 3.4 adhere to: a. organisational policies and procedures b. legal and ethical requirements when carrying out business negotiations.

Assessment Guidance
Evidence may be supplied by: • report • product • professional discussion • questioning • witness testimony.

Unit 303 Negotiate in a business environment

Supporting information

Guidance

Whilst working through this unit, any report at this level would need to be in excess of 500 words. The report can be holistic and supported by other methods of evidencing ie observation report, product etc.

Unit 304 Develop a presentation

UAN:	**K/506/1913**
Level:	3
Credit value:	3
GLH:	11
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAA617 Develop a presentation.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to develop a presentation. Upon completion of this unit, learners will understand best practice in developing presentations and will be able to develop a structured presentation.

Learning outcome
The learner will: 1. Understand how to develop a presentation.
Assessment criteria
The learner can: 1.1 explain **best practice** in developing presentations 1.2 explain who needs to be consulted on the development of a presentation 1.3 explain the **factors** to be taken into account in developing a presentation 1.4 analyse the advantages and limitations of different **communication media**.

Assessment Guidance
Best practice: • appropriate size font • use of colour as appropriate • use of charts appropriately • choosing the right method for the occasion (eg handout to present to a meeting rather than a 35 slide presentation which says the same)

Factors:

- specific aims and objectives
- research topic
- include key points
- use colour appropriately
- product relevant handouts
- Five 'P's – **P**lanning and **P**reparation **P**revent **P**oor **P**erformance

Communication media:

- meetings
- e-mail
- conference calls
- reports
- presentations
- webinar

Evidence may be supplied by:

- report
- professional discussion
- questioning

Learning outcome
The learner will: 2. Be able to develop a presentation.
Assessment criteria
The learner can: 2.1 identify the: a. purpose b. content c. style d. timing e. audience for a presentation 2.2 select a **communication media** that is appropriate to the: a. nature of a presentation b. message c. audience 2.3 tailor a presentation to fit the timescale and audience's needs 2.4 prepare a presentation that is: a. logically structured b. summarises the content c. addresses the brief 2.5 take action to ensure that a presentation adheres to organisational guidelines and policies 2.6 develop **materials** that support the content of a presentation.

Assessment Guidance
Communication media: • slide presentation • flip chart with handouts • handouts only **Materials:** • handouts • activities • data specific eg financial standing in the market **Evidence may be supplied by:** • product • report • professional discussion • questioning.

Unit 304 Develop a presentation

Supporting information

Guidance

Whilst working through this unit, any report at this level would need to be in excess of 500 words. The report can be holistic and supported by other methods of evidencing ie observation report, product etc.

Unit 305 Deliver a presentation

UAN:	**M/506/1914**
Level:	3
Credit value:	3
GLH:	17
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAA623 Deliver a presentation.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to deliver a presentation. Upon completion of this unit, learners will be able to prepare for and deliver a presentation.

Learning outcome
The learner will: 1. Understand the principles underpinning the delivery of presentations.
Assessment criteria
The learner can: 1.1 analyse the advantages and limitations of different **methods of, and media for, making presentations** 1.2 explain how the type and size of the **audience** affects the delivery of a presentation 1.3 explain the factors to be taken into account in developing **contingency** plans when delivering presentations 1.4 explain voice projection and timing **techniques** when delivering presentations 1.5 explain the **factors** to be taken into account in responding to questions from an audience 1.6 explain different **methods** for evaluating the effectiveness of a presentation.

Assessment Guidance
Methods of, and media for, making presentations: • oral • slides • handouts • cue cards • whiteboard • flipchart • webinar **Audience:** • medium – between 10 and 25 • large – more than 25 **Contingency:** • something that may happen • something set aside for unforeseen emergency **Techniques:** The 'Goldilocks principle' – delivery of the presentation to suit the audience, and if the material and timing is right the topic will be understood. **Factors:** • that test your expertise • that demonstrates the questioner's expertise • that aims to correct an assertion you have made • that seeks justification • that comes too early • you cannot answer **Methods:** • question and answer • feedback questionnaire • follow up e-mail **Evidence may be supplied by:** • report • professional discussion • questioning

Learning outcome
The learner will: 2. Be able to prepare to deliver a presentation.
Assessment criteria
The learner can: 2.1 confirm the layout of the venue and correct functioning of equipment and resources prior to making a presentation 2.2 develop contingency plans for potential equipment and resource failure 2.3 take action to ensure that the presentation fits the time slot available.

Assessment Guidance
Evidence may be supplied by: • observation • product • witness testimony • professional discussion • questioning

Learning outcome
The learner will: 3. Be able to deliver a presentation.
Assessment criteria
The learner can: 3.1 speak clearly and confidently, using language that is appropriate for the topic and the audience 3.2 vary their voice: a. tone b. pace c. volume appropriately when delivering a presentation 3.3 use body language in a way that reinforces messages 3.4 use equipment and resources effectively when delivering a presentation 3.5 deliver a presentation within the agreed timeframe 3.6 respond to questions in a way that meets the audience's needs 3.7 evaluate the effectiveness of a presentation.

Assessment Guidance
Evidence may be supplied by: • observation • product • witness testimony • professional discussion • questioning.

Unit 305 Deliver a presentation

Supporting information

Guidance

Whilst working through this unit, any report at this level would need to be in excess of 500 words. The report can be holistic and supported by other methods of evidencing ie observation report, product etc.

Unit 306 Create bespoke business documents

UAN:	**T/506/1915**
Level:	3
Credit value:	4
GLH:	23
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAA212 Design and produce documents in a business environment.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to create bespoke business documents. Upon completion of this unit, learners will understand how to create bespoke business documents and will be able to apply this knowledge when designing and creating bespoke business documents.

Learning outcome
The learner will: 1. Understand how to create bespoke business documents.
Assessment criteria
The learner can: 1.1 explain the use of bespoke **business documents** 1.2 describe the **factors** to be taken into account in selecting the appropriate method of presenting a business document 1.3 describe the use of **technology** to create bespoke business documents 1.4 explain the purpose and requirements of **corporate identity** in bespoke business documents 1.5 **analyse** different design **techniques** used to create attractive bespoke business documents 1.6 explain the factors to be taken into account in evaluating the impact of bespoke business documents.

Assessment Guidance
Business documents: • brochures • catalogue • poster • advertising documentation • training manuals (eg health & safety) • new letterheads with complimentary slips and business cards **Factors:** • size of audience to impress • content, legal, advertising, global **Technology:** • desk-top publishing software • software subject specific (eg Contract Management) • digital Media • corporate identity • company image • uniqueness • distinctiveness **Analyse:** Break the information into constituent parts; examine the relationship between the parts; question the information. **Techniques:** Kano Model Analysis (Dr Noriaki Kano) – a useful technique for deciding which features you want to include in a product or service. You might want to research other techniques. **Evidence may be supplied by:** • report • professional discussion • questioning

Learning outcome
The learner will: 2. Be able to design bespoke business documents.
Assessment criteria
The learner can: 2.1 confirm the: a. purpose b. nature c. content d. style e. quality standards f. audience g. deadline of the document 2.2 identify the **optimum method** of presenting the document 2.3 create design options that meet the specification 2.4 take into account feedback from **stakeholders**.

Assessment Guidance
Optimum method: eg • best possible • most advantageous **Stakeholders** • those with a direct interest – clients, customers • end user recipients **Evidence may be supplied by:** • product • observation • professional discussion • witness testimony • questioning

Learning outcome
The learner will: 3. Be able to create bespoke business documents.
Assessment criteria
The learner can: 3.1 include content that: a. meets the brief b. is accurate c. grammatically correct 3.2 use design techniques to create documents that meet the specification 3.3 integrate non-text items into the agreed layout 3.4 present documents within the agreed timescale.

Assessment Guidance
Evidence may be supplied by: • product • observation • professional discussion • witness testimony • questioning.

Unit 306 Create bespoke business documents

Supporting information

Guidance

Whilst working through this unit, any report at this level would need to be in excess of 500 words. The report can be holistic and supported by other methods of evidencing ie observation report, product etc.

Unit 307 Contribute to the development and implementation of an information system

UAN:	**A/506/1916**
Level:	3
Credit value:	6
GLH:	21
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAD111 Support the design and development of information system.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to contribute to the development and implementation of an information system. Upon completion of this unit learners will have developed an understanding of the design and implementation of an information system. Learners will be able to contribute to both the development and implementation of an information system.

Learning outcome
The learner will: 1. Understand the design and implementation of an information system.
Assessment criteria
The learner can: 1.1 explain the types of **information** to be managed by a system 1.2 explain how information will be used and by whom 1.3 explain who needs to be consulted in the design and implementation of an information system and why 1.4 explain the impact of legal and organisational security and confidentiality requirements for the design and implementation of an information system.

Assessment Guidance
Information: eg • sales • purchasing • accounts • personnel • payroll • stock • customers • suppliers • technical specifications • legislation • and many more **Evidence may be supplied by:** • report • professional discussion • questioning

Learning outcome
The learner will: 2. Be able to contribute to the development of an information system.
Assessment criteria
The learner can: 2.1 confirm the: a. **purpose** b. **use** c. **features** of an information system 2.2 identify the information that will be managed by the system 2.3 confirm requirements for reporting information 2.4 recommend the **functions** that will be used to manipulate and report information 2.5 develop guidance for the use of an information system that is accurate and easy to understand 2.6 recommend user access and security levels for the information system 2.7 make contributions to the development of an information system that are consistent with business objectives and values and within budgetary constraints 2.8 participate in system tests in accordance with the specification.

Assessment Guidance
Purpose, use and features: • processing fast and accurate data • large capacity fast access storage • fast communication, both technological and human • reduce information overload • span boundaries • a competitive weapon **Functions:** • classification • sort information • summarise information • identify information **Evidence may be supplied by:** • product • report • witness testimony • professional discussion • questioning

Learning outcome
The learner will: 3. Be able to contribute to the implementation of an information system.
Assessment criteria
The learner can: 3.1 implement the information system in accordance with the plan, minimising disruption to business 3.2 confirm that staff are trained to use the system prior to its launch 3.3 resolve or report problems or faults with the information system within the limits of their own authority 3.4 adhere to: a. organisational policies and procedures b. legal and ethical requirements in the implementation of an information system.

Assessment Guidance
Evidence may be supplied by: • product • report • witness testimony • professional discussion • questioning.

Unit 307 Contribute to the development and implementation of an information system

Supporting information

Guidance

Whilst working through this unit, any report at this level would need to be in excess of 500 words. The report can be holistic and supported by other methods of evidencing ie observation report, product etc.

Unit 308 Monitor information systems

UAN:	**F/506/1917**
Level:	3
Credit value:	8
GLH:	43
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAD131 Monitor information systems.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to monitor information systems. Upon completion of this unit, learners will have an understanding of how information systems are used and will be able to monitor information systems.

Learning outcome
The learner will: 1. Understand how information systems are used.
Assessment criteria
The learner can: 1.1 explain how the intended use of **reports** affects the choice of format and language 1.2 explain how the audience of reports affects the choice of format and language 1.3 explain the features of different **problem-solving techniques** related to information systems 1.4 evaluate the suitability of possible problem-solving actions related to information systems 1.5 explain techniques to **validate** the reliability of information 1.6 analyse the suitability of different **evaluation** techniques related to information systems 1.7 assess the potential consequences of breaches of confidentiality 1.8 evaluate the potential consequences of publishing reports containing inaccurate or unsubstantiated information.

Assessment Guidance
Reports: • informational • analytical • research **Problem-solving techniques:** • upgrades • training • re-training **Validate** by: eg • double entry • proof-reading • data type • range and constraint • code and cross-reference • structured • check digit • format check • length check • lookup table • presence check • range check **Evaluation:** • observation of users • surveys • interviews **Evidence may be supplied by:** • report • professional discussion • questioning

Learning outcome
The learner will: 2. Be able to monitor information systems.
Assessment criteria
The learner can: 2.1 develop a plan to monitor information systems that specifies: a. objectives b. scope c. timescale d. resource implications e. the techniques to be used f. reporting requirements 2.2 carry out monitoring activities in accordance with the plan 2.3 provide training and support to system users that is appropriate to their needs 2.4 identify the cause of problems with an information system 2.5 suggest solutions to problems with an information system 2.6 recommend adaptations to the system in response to identified problems or developments 2.7 adhere to: a. organisational policies and procedures b. legal and ethical requirements when monitoring information systems.

Assessment Guidance
Evidence may be supplied by: • product • witness testimony • professional discussion • questioning.

Unit 308 Monitor information systems

Supporting information

Guidance

Whilst working through this unit, any report at this level would need to be in excess of 500 words. The report can be holistic and supported by other methods of evidencing ie observation report, product etc.

Unit 309 Evaluate the provision of business travel or accommodation

UAN:	**J/506/1918**
Level:	3
Credit value:	5
GLH:	30
Relationship to NOS:	This unit is linked to the Business & Administration (2013) National Occupational Standards: • CFABAA322 Organise business travel or accommodation.
Assessment requirements specified by a sector or regulatory body:	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Aim:	This unit aims to develop the knowledge and skills required to evaluate the provision of business travel or accommodation. Upon completion of this unit, learners will have developed an understanding of the provision of business travel or accommodation arrangements. Learners will utilise this knowledge when evaluating the quality of organisational business travel or accommodation arrangements and making recommendations for improvements.

Learning outcome
The learner will: 1. Understand the provision of business travel or accommodation arrangements.
Assessment criteria
The learner can: 1.1 explain the **factors** to be taken into account in setting evaluation criteria for the provision of business travel or accommodation 1.2 explain different travel or accommodation-related **needs** and services 1.3 explain different arrangements that could be made for the provision of business travel or accommodation 1.4 explain the scope of legal and organisational security and confidentiality requirements relating to business travel or accommodation.

Assessment Guidance
Factors: • cost • suitability • discounts • delivery and after-sales service charges • reliability and reputation **Needs:** eg • transport; car, train, plane • hotel; 3*, 4* or 5* • foreign currency • visa • budgetary restraints **Evidence may be supplied by:** • report • professional discussion • questioning

Learning outcome
The learner will: 2. Be able to evaluate the quality of organisational business travel or accommodation arrangements.
Assessment criteria
The learner can: 2.1 assess the performance of providers of travel or accommodation against **agreed criteria** 2.2 identify instances of exceptional and inadequate performance 2.3 evaluate the benefits and limitations of existing arrangements for organising business travel or accommodation and their implications 2.4 identify alternative potential providers and ways of providing travel or accommodation.

Assessment Guidance
Agreed criteria: • cost • quality and safety • service • delivery • social responsibility • convenience • risk • responsiveness **Evidence may be supplied by:** • product • report • professional discussion • questioning

Learning outcome
The learner will: 3. Be able to recommend improvements to organisational business travel or accommodation arrangements.
Assessment criteria
The learner can: 3.1 produce costed plans that set out different **options**: a. their benefits b. limitations c. implications 3.2 shortlist alternative potential providers of business travel or accommodation against agreed criteria 3.3 adhere to: a. organisational policies and procedures b. legal and ethical requirements when recommending improvements to arrangements for business travel or accommodation.

Assessment Guidance
Options: • benefits – special deals, use of corporate credit card etc. • limitations – only specific chain of hotels possible • implications – could miss out on better deals **Evidence may be supplied by:** • report • product • professional discussion • questioning.

Unit 309 Evaluate the provision of business travel or accommodation

Supporting information

Guidance

Whilst working through this unit, any report at this level would need to be in excess of 500 words. The report can be holistic and supported by other methods of evidencing ie observation report, product etc.

Unit 314 Administer legal files

UAN:	**J/506/1935**
Level:	3
Credit value:	5
GLH:	31
Relationship to NOS:	Business & Administration (2013) National Occupational Standards: • CFABAB111 Administer legal files
Assessment requirements specified by a sector or regulatory body:	Skills CFA Assessment Strategy Competence units (S/NVQ)
Aim:	This unit aims to develop the knowledge and skills required to administer legal files. Upon completion of this unit, learners will have developed an understanding of the administration of legal files and will be able to maintain, close, and archive a legal file.

Learning outcome
The learner will: 1. Understand the administration of legal files.
Assessment criteria
The learner can: 1.1 explain the administrative requirements of the different **legal areas** being administered 1.2 explain the scope and limits of their own responsibilities and authority 1.3 explain the requirements of the duty of confidentiality 1.4 explain the use of **specialist software** for processing legal cases 1.5 explain the potential consequences of inadequate or inaccurate record keeping 1.6 describe the organisational and regulatory purpose and nature of different legal checks and searches 1.7 explain the organisational and regulatory purpose of a client care letter 1.8 explain how records of **time spent** on work are used.

Assessment Guidance
Legal areas: • Civil Litigation Department • Family Department • Probate Department • Conveyance Department • Common Law • Criminal Law **Specialist software:** • Case Management **Time spent:** • time recording • 'Bill of Costs' **Evidence may be supplied by:** • report • professional discussion • questioning

Learning outcome
The learner will: 2. Be able to maintain a legal file.
Assessment criteria
The learner can: 2.1 confirm that information on file is complete, accurate and valid 2.2 process money received from clients in accordance with organisational and regulatory requirements 2.3 keep fee-earners informed of actions taken, progress, developments and problems 2.4 take action to ensure that files are correctly labelled and dated including summaries of their contents 2.5 generate correspondence that conform with the requirements of house style 2.6 record all time spent, costs and disbursements accurately 2.7 generate accurate bills that conform with organisational and regulatory requirements 2.8 adhere to organisational policies and procedures, and legal and ethical requirements when maintaining a legal file.

Assessment Guidance
Evidence may be supplied by: • observation • professional discussion • report • witness testimony • questioning

Learning outcome
The learner will: 3. Be able to close and archive a legal file.
Assessment criteria
The learner can: 3.1 address any outstanding issues for a legal file 3.2 prepare accurate final bills in accordance with organisational and regulatory requirements 3.3 take action to ensure that closed files contain all the necessary documentation 3.4 confirm whether any documents need to be added to the firm's precedent, knowledge or data bank 3.5 close files in accordance with organisational standards and procedures when the account shows a nil balance 3.6 archive files in accordance with organisational and regulatory requirements.

Assessment Guidance
Evidence may be supplied by: • observation • professional discussion • report • witness testimony • questioning.

Unit 314 Administer legal files

Supporting information

Guidance

Whilst working through this unit, any report at this level would need to be in excess of 500 words. The report can be holistic and supported by other methods of evidencing i.e. observation report, product etc.

Unit 315 Build legal case files

UAN:	**L/506/1936**
Level:	3
Credit value:	5
GLH:	32
Relationship to NOS:	Business & Administration (2013) National Occupational Standards: • CFABAB112 Build case files
Assessment requirements specified by a sector or regulatory body:	Skills CFA Assessment Strategy Competence units (S/NVQ)
Aim:	This unit aims to develop the knowledge and skills required to build legal case files. Upon completion of this unit, learners will understand how to, and be able to, build legal case files.

Learning outcome
The learner will: 1. Understand how to build legal case files.
Assessment criteria
The learner can: 1.1 explain the administrative requirements of the different **legal areas** being administered 1.2 explain the scope and limits of their own responsibilities and authority 1.3 explain the requirements of the duty of confidentiality 1.4 explain how to identify shortfalls in evidence and materials 1.5 explain the features and uses of different interviewing techniques 1.6 explain the use of **specialist software** for processing legal cases 1.7 explain how to access and use sources of information and evidence 1.8 explain the potential consequences of not meeting deadlines when building a legal case file.

Assessment Guidance
Legal areas: • Civil Litigation Department • Family Department • Probate Department • Conveyance Department • Common Law • Criminal Law **Specialist software:** • Case Management **Evidence may be supplied by:** • report • professional discussion • questioning

Learning outcome
The learner will: 2. Be able to build case files.
Assessment criteria
The learner can: 2.1 identify gaps in evidence and materials needed 2.2 carry out interviews in accordance with the principles of best practice in communication and interviewing 2.3 obtain evidence and materials needed to complete the file 2.4 generate correspondence that conforms with the **house style** and regulatory requirements 2.5 submit cases on time in line with internal and external deadlines 2.6 complete follow-up actions in accordance with the instructions 2.7 adhere to organisational policies and procedures, and legal and ethical requirements when building case files.

Assessment Guidance
House style: The way things are done in the organisation. **Evidence may be supplied by:** • observation • product • professional discussion • report • questioning • witness testimony.

Unit 315 Build legal case files

Supporting information

Guidance

Whilst working through this unit, any report at this level would need to be in excess of 500 words. The report can be holistic and supported by other methods of evidencing ie observation report, product etc.

Unit 316 Manage legal case files

UAN:	**Y/506/1938**
Level:	3
Credit value:	5
GLH:	32
Relationship to NOS:	Business & Administration (2013) National Occupational Standards: • BAB113 Manage case files
Assessment requirements specified by a sector or regulatory body:	Skills CFA Assessment Strategy Competence units (S/NVQ)
Aim:	This unit aims to develop the knowledge and skills required to manage legal case files. Upon completion of this unit, learners will understand how to, and be able to, manage legal case files.

Learning outcome
The learner will: 1. Understand the management of legal case files.
Assessment criteria
The learner can: 1.1 explain the administrative requirements of the different **legal areas** being administered 1.2 explain the scope and limits of their own responsibilities and authority 1.3 explain the requirements of the duty of confidentiality 1.4 describe the structure, format and contents of a case file 1.5 explain how to validate information when managing a legal case file 1.6 explain the requirements of processing appeals 1.7 explain the potential consequences of not meeting internal and external deadlines when managing a legal case file.

Assessment Guidance
Legal areas: • Civil Litigation Department • Family Department • Probate Department • Conveyance Department • Common Law • Criminal Law **Evidence may be supplied by:** • report • professional discussion • questioning

Learning outcome
The learner will: 2. Be able to manage case files.
Assessment criteria
The learner can: 2.1 plan the management of a case file to meet deadlines 2.2 identify the location of required documents and materials 2.3 take action to ensure the file contains accurate and up-to-date information, documents and materials and is secure 2.4 take action to ensure court bundles are prepared correctly 2.5 generate correspondence and documents that conform with the requirements of **house style** and legal and procedural requirements 2.6 submit documents on time 2.7 process and record the hearing outcomes in accordance with organisational and procedural requirements 2.8 close and archive files in accordance with organisational and regulatory requirements 2.9 keep fee-earners informed of actions taken, progress, developments and problems 2.10 adhere to organisational policies and procedures, and legal and ethical requirements when managing case files.

Assessment Guidance
House style: The way things are done in the organisation. **Evidence may be supplied by:** • observation • product • professional discussion • witness testimony • questioning.

Unit 316 Manage legal case files

Supporting information

Guidance

Whilst working through this unit, any report at this level would need to be in excess of 500 words. The report can be holistic and supported by other methods of evidencing ie observation report, product etc.

Unit 321 Manage an office facility

UAN:	**K/506/1944**
Level:	3
Credit value:	4
GLH:	21
Relationship to NOS:	Business & Administration (2013) National Occupational Standards: • CFABAA118 Manage an office facility
Assessment requirements specified by a sector or regulatory body:	Skills CFA Assessment Strategy Competence units (S/NVQ)
Aim:	This unit aims to develop the knowledge and skills required to manage an office facility. Upon completion of this unit, learners will have developed an understanding of the management of an office facility and will be able to apply this when managing and maintaining an office facility.

Learning outcome
The learner will: 1. Understand the management of an office facility.
Assessment criteria
The learner can: 1.1 explain the requirements of **establishing** and implementing office management procedures 1.2 explain how to **manage** the effectiveness of work and systems 1.3 explain how to manage any **constraints** attached to office facilities and related budgets 1.4 explain the **factors** to be taken into account in the design of office systems, procedures and guidance documents 1.5 explain how to create an environment that is conducive to productive work.

Assessment Guidance
Establishing: • developing the idea stage • the research and development stage • the executive/implement stage **Manage:** • team meetings • Key Performance Indicators (KPIs) • setting performance standards **Constraints:** • contractual obligations with existing supplier • delivery charges that might apply • limited suppliers to choose from locally **Factors:** • cost • review need • discuss with end users • design system/procedure and guidance documents • implement • delivery any training (systems) • evaluate **Evidence may be supplied by:** • report • professional discussion • questioning

Learning outcome
The learner will: 2. Be able to manage and maintain an office facility.
Assessment criteria
The learner can: 2.1 maintain equipment and **consumables** to agreed levels 2.2 establish systems to evaluate the effectiveness of office systems and procedures 2.3 review the effectiveness of office systems and procedures to meet users' needs, adapting them to meet changing demands 2.4 manage the maintenance of office equipment to meet users' needs and expectations 2.5 manage effective relationships with suppliers 2.6 take action to ensure that administrative services are provided to agreed standards.

Range
Consumables: eg • stationery (paper/envelopes/post-its/complimentary slips) • printer/photocopier cartridges • pens/pencils **Evidence may be provided by:** • observation • product • witness testimony • professional discussion • report.

Unit 321 Manage an office facility

Supporting information

Guidance

Whilst working through this unit, any report at this level would need to be in excess of 500 words. The report can be holistic and supported by other methods of evidencing ie observation report, product etc.

Unit 322 Analyse and present business data

UAN:	**M/506/1945**
Level:	3
Credit value:	6
GLH:	24
Relationship to NOS:	Business & Administration (2013) National Occupational Standards: • CFABAD322 Analyse and report data
Assessment requirements specified by a sector or regulatory body:	Skills CFA Assessment Strategy Competence units (S/NVQ)
Aim:	This unit aims to develop the knowledge and skills required to analyse and present business data. Upon completion of this unit, learners will have developed an understanding of the analysis and presentation of business data. Learners will be able to analyse both quantitative and qualitative business data and will also be able to present this analysis appropriately.

Learning outcome
The learner will: 1. Understand the analysis and presentation of business data.
Assessment criteria
The learner can: 1.1 explain the uses and limitations of **primary** and **secondary** data 1.2 explain the uses and limitations of **quantitative** and **qualitative** data 1.3 evaluate the issues relating to the **validity** and **reliability** of data and its analysis 1.4 explain the use of IT tools to carry out research 1.5 assess the risks attached to making judgments based on limited or unrepresentative samples 1.6 assess the risks attached to generalising research findings 1.7 explain different **formats and techniques** for the presentation of the analysis.

Assessment Guidance/ Evidence Requirements
Primary: Main, most important. **Secondary:** Less important. **Quantitative:** • deals with numbers • measureable **Qualitative:** • deals with descriptions • data can be observed but not measured **Validity:** Is data sound? **Reliability:** Is data consistent, trustworthy and dependable? **Formats and techniques** eg • tables • pie chart • bar chart • report (text) with appropriate use of the above

Learning outcome
The learner will: 2. Be able to analyse quantitative and qualitative business data.
Assessment criteria
The learner can: 2.1 agree the **parameters** of the analysis 2.2 clarify any **ethical** requirements of the analysis 2.3 organise the data in a way that will facilitate its analysis 2.4 select **valid** and **reliable** data analysis methods and techniques that are appropriate to the data and analysis objectives 2.5 apply **analytical techniques** that are appropriate to the purpose of the research and the nature of the data 2.6 confirm the accuracy of data analysis and make necessary adjustments 2.7 draw conclusions that are valid and supported by evidence.

Assessment Guidance
Parameters: • limitations • restrictions **Ethical:** • moral • right • fair **Valid:** • sound • suitable • applicable **Reliable** • dependable • trustworthy **Analytical techniques** • Key Driver Analysis • Correspondence Analysis • Decision Tree Algorithms • Factor Analysis Just a few techniques although you may come across others, but the analysis should be: • logical • systematic • methodical • reasoned **Evidence may be provided by:** • report • product • witness testimony • professional discussion

Learning outcome
The learner will: 3. Be able to present the analysis of business data.
Assessment criteria
The learner can: 3.1 present data in the agreed reporting format and house style 3.2 acknowledge the limitations of the analysis 3.3 reference data sources.

Assessment Guidance
Evidence may be provided by: • product • report • professional discussion • questioning.

Unit 322 Analyse and present business data

Supporting information

Guidance

Whilst working through this unit, any report at this level would need to be in excess of 500 words. The report can be holistic and supported by other methods of evidencing ie observation report, product etc.

Unit 328 Spreadsheet software

UAN:	**J/502/4626**
Level:	3
Credit value:	6
GLH:	45
Assessment type:	Portfolio of evidence or Assignment (from 7574 ITQ Users)
Relationship to NOS:	This unit is based on the Level 3 National Occupational Standards for IT users.
Endorsement by a sector or regulatory body:	This unit is endorsed by Tech Partnership, the Sector Skills Council for IT and Telecoms.
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.

Learning outcome
The learner will: 1. Use a spreadsheet to enter, edit and organise numerical and other data.
Assessment criteria
The learner can: 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.

Assessment Guidance
Evidence may be supplied by: • product • expert witness testimony

Learning outcome
The learner will: 2. Select and use appropriate formulas and data analysis tools and techniques to meet requirements.
Assessment criteria
The learner can: 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.

Assessment Guidance
Evidence may be supplied by: • product • expert witness testimony

Learning outcome
The learner will: 3. Use tools and techniques to present, and format and publish spreadsheet information.
Assessment criteria
The learner can: 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.

Assessment Guidance
Evidence may be supplied by: • product • expert witness testimony

Unit 344 Participate in a project

UAN:	**F/506/1934**
Level:	3
Credit value:	3
GLH:	19
Relationship to NOS:	Management & Leadership (2012) National Occupational Standards: • CFAM&LFA5 Manage projects
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Skills CFA Assessment Strategy Competence units (S/NVQ)
Aim:	This unit aims to develop the knowledge and skills required to participate in a project. Upon completion of this unit, learners will understand how to manage a project and will be able to support the delivery of a project.

Learning outcome
The learner will: 1. Understand how to manage a project.
Assessment criteria
The learner can: 1.1 explain the features of a project business case 1.2 explain the stages of a project lifecycle 1.3 explain the roles of people involved in a project 1.4 explain the uses of project-related information 1.5 explain the advantages and limitations of different project monitoring techniques 1.6 analyse the interrelationship of project scope, schedule, finance, risk, quality and resources.

Assessment Guidance
Evidence may be supplied by: • report • professional discussion • questioning

Learning outcome
The learner will: 2. Be able to support the delivery of a project.
Assessment criteria
The learner can: 2.1 fulfil their role in accordance with a project plan 2.2 collect project-related information in accordance with project plans 2.3 use appropriate tools to analyse project information 2.4 report on information analysis in the agreed format and timescale 2.5 draw issues, anomalies and potential problems to the attention of project managers 2.6 adhere to organisational policies and procedures, legal and ethical requirements in supporting the delivery of a project.

Assessment Guidance
Evidence may be supplied by: • product • professional discussion • questioning • report

Unit 345 Manage personal and professional development

UAN:	**T/506/2952**
Level:	3
Credit value:	3
GLH:	12
Relationship to NOS:	Management & Leadership (2012) National Occupational Standards: • CFAM&LFA5 Manage projects
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Skills CFA Assessment Strategy Competence units (S/NVQ)
Aim:	This unit aims to develop the knowledge and skills required to manage personal and professional development. Upon completion of this unit, learners will be able to identify personal and professional development requirements and fulfil a personal and professional development plan. Learners will also be able to maintain a personal and professional development plan ensuring its relevance.

Learning outcome
The learner will: 1. Be able to identify personal and professional development requirements.
Assessment criteria
The learner can: 1.1 compare sources of information on professional development trends and their validity 1.2 identify trends and developments that influence the need for professional development 1.3 evaluate their own current and future personal and professional development needs relating to the role, the team and the organisation.

Assessment guidance
1.1 Sources of information on professional development trends in their own profession/industry. Such sources could include publications and other information from: • professional bodies • professional networks • trade associations • organisation's employee development department • training organisations • internet Any comparison would look at strengths/ weaknesses, advantages/disadvantages of each source. In this criterion the learner is required to compare sources of information on professional development trends, and their validity, using at least two sources of information.
1.2 Information on trends and developments in their own profession, industry or organisation that could influence the need for professional development. These could include changes in: • systems or technology • market changes • competition • legislation In this criterion the learner is required to identify at least two trends and/or developments that could influence the need for professional development. These should be described.
1.3 Information gathered in ACs 1.1 and 1.2 can be used to identify current and future knowledge, skills and experience needs relating to their role, team and organisation. Information sources on current and future needs could also include performance appraisals, job description, business plans, and team objectives. An evaluation would look at current knowledge, skills and experience levels and the extent to which they satisfy current and potential future needs. This will form the basis for the skills gap analysis in AC2.3 In this criterion the learner is required to provide evidence of evaluating their own current and future personal and professional development needs relating to their role, the team and organisation.

Learning outcome
The learner will: 2. Be able to fulfil a personal and professional development plan.
Assessment criteria
The learner can: 2.1 evaluate the benefits of personal and professional development 2.2 explain the basis on which types of development actions are selected 2.3 identify current and future likely skills, knowledge and experience needs using skills gap analysis 2.4 agree a personal and professional development plan that is consistent with business needs and personal objectives 2.5 execute the plan within the agreed budget and timescale 2.6 take advantage of development opportunities made available by professional networks or professional bodies.

Assessment guidance
2.1 Information gathered in the previous ACs can be used to identify the benefits of the personal and professional development required. An evaluation should include both the benefits **and** potential costs – financial, personal etc. In this criterion the learner is required to provide evidence of evaluating the benefits of personal and professional development.
2.2 Identify the different types of development methods available to address the needs identified in section 1.3 including: • training courses – including different providers and different learning methods and technologies • coaching • mentoring Use those learning needs, learning and development opportunities and preferred learner styles to select the most appropriate training and development actions for the needs identified. In this criterion the learner is required to select the type of development action(s) required and explain the basis on which the selection was made.
2.3 Use information gathered on future and current skills, knowledge and experience to prepare a skills gap analysis. This will form the basis of a development plan (AC 2.4). In this criterion the learner is required to provide a skills gap analysis that will form the basis of their development plan.
2.4 Agree with relevant parties such as line manager, training and development department and budget holder, a personal development plan which contains SMART objectives(see AC3.1), resources, timescales, and review mechanisms.

In this criterion the learner is required to prepare and agree a correct and appropriate development plan and present this as evidence

2.5

Executing the personal development requires personal commitment to completing the personal development plan within agreed budget and timescales.

In this criterion the learner is required to execute the development plan within the agreed budget and timescales.

2.6

Professional networks and other sources of support for development needs can be identified and used to support the development plan.

In this criterion the learner is required to provide evidence of how they have used professional networks and other sources of support when completing their development plan.

Learning outcome
The learner will: 3. Be able to maintain the relevance of a personal and professional development plan.
Assessment criteria
The learner can: 3.1 explain how to set specific, measurable, achievable, realistic and time-bound (SMART) objectives 3.2 obtain feedback on performance from a range of valid sources 3.3 review progress toward personal and professional objectives 3.4 amend the personal and professional development plan in the light of feedback received from others.

Assessment guidance

3.1

Development objectives set should follow the SMART model

- Specific: Clear, unambiguous, straightforward, understandable
- Measurable: Related to quantified or qualitative performance measures
- Achievable: With known resources
- Realistic: Linked to business needs
- Time-bound: Building-in completion date and review dates

In this criterion the learner is required to explain how objectives set in 2.4 satisfy the SMART model.

3.2

Feedback from others is important to assess performance improvements achieved as a result of personal and professional development. This feedback could come from a number of sources including line manager, customers and team members. This feedback

can be formal, as in a performance review, or informal, as in observations or comments made. Organisational performance indicators, customer/ employee surveys etc., could also be used. In this criterion the learner is required to provide evidence of feedback from at least two valid sources to demonstrate whether or not the training development plan that is being implemented is effective in improving performance.
Review mechanisms in the development plan prepared and implemented in ACs 2.4 and 2.5 can be used to review progress towards personal and professional objectives. In this criterion the learner is required to provide evidence that progress against the development plan has been reviewed and the outcome of that review.
The personal professional development plan being implemented will need to be amended in light of feedback received or learner's own observations from the review. In this criterion the learner is required to provide evidence that they have amended their development plan in light of feedback received from others (See ACs 3.2. and 3.3).

Unit 349 Presentation software

UAN:	**T/502/4623**
Level:	3
Credit value:	6
GLH:	45
Assessment type:	Portfolio of Evidence or assignment (7574 ITQ Users)
Relationship to NOS:	This unit is linked to the Level 3 IT User NOS devised by Tech Partnership.
Assessment requirements specified by a sector or regulatory body:	This unit is endorsed by Tech Partnership, the Sector Skills Council for ICT.
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.

Learning outcome
The learner will: 1. Input and combine text and other information within presentation slides.
Assessment criteria
The learner can: 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.

Learning outcome
The learner will: 2. Use presentation software tools to structure, edit and format presentations.
Assessment criteria
The learner can: 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 outcome
The learner will: 3. Prepare interactive slideshow for presentation.
Assessment criteria
The learner can: 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.

Unit 360 Medical administration

UAN:	**R/505/1263**
Level:	3
Credit value:	8
GLH:	58
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 administrator. It provides the learner with an understanding of administrative procedures and the skills and qualities required to provide effective administrative 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 outcome
The learner will: 1. Understand the role and responsibilities of the medical administrator.
Assessment criteria
The learner can: 1.1 explain the **skills** and **qualities** required of the medical administrator 1.2 describe the range of **duties** carried out by the medical administrator 1.3 explain the importance of accountability when handling **cash** 1.4 describe the **process** of organising a meeting 1.5 describe the **additional responsibilities** of the medical administrator in private practice.

Range
Skills Accurate word processing, medical audio, shorthand skills and a good knowledge of medical terminology, ability to use databases and spreadsheets, good organisational and administrative skills, spoken and written skills. **Qualities** Tact, discretion, sensitive sympathetic friendly, team player, caring and friendly, good time keeper, flexible and adaptable appreciation of need for confidentiality, able to work with diversity. **Duties** Dealing with post, answering the telephone, making appointments, typing letters and discharge summaries, dealing with stationery requests, managing the doctor's diary, dealing with test results, organise meetings, take minutes. **Cash** Cash received, cash expenditure, petty cash. **Process** Agree a meeting date, book meeting room and audio-visual equipment, organise sufficient chairs and refreshments, send out meeting notice and agenda, consider special requirements, for internal and external meetings, liaise with the Chair. **Additional responsibilities** Clinical duties, liaising with the NHS, maintaining the waiting room, ensuring that patients are aware of costs, acting as chaperone, managing the practice, sending patients' accounts and following up, keeping accounts and payroll supplies.

Learning outcome
The learner will: 2. Understand medical administrative procedures.
Assessment criteria
The learner can: 2.1 explain the different types of **hospital admission** 2.2 describe the procedures involved in making new and follow-up appointments 2.3 evaluate different types of **appointment systems** in primary care 2.4 describe the procedures for registering new and temporary patients in a general practice 2.5 explain the **circumstances** under which a patient can be removed from the practice list 2.6 describe patient discharge procedures 2.7 describe the **procedures** that must be followed when a patient dies.

Range
Hospital admission Elective admission, emergency admissions, admission arranged by a GP directly with a hospital, compulsory admission, voluntary admission. **Appointment systems** Computerised appointments, advanced booking, sequential, block booking and limited block booking. **Circumstances** There has been an irretrievable breakdown in the relationship between the doctor and patient, the patient has moved outside the practice boundary, patient being violent or abusive to staff, patient makes unrealistic demands upon the practice. **Patient discharge procedures** Carried out by the medical administrator and others (ie what administrative procedures take place when a doctor discharges a patient). **Procedures when a patient dies** Carried out by the medical secretary and by others (including post mortems and when an inquest is required).

Learning outcome
The learner will: 3. Understand the dynamics of the team.
Assessment criteria
The learner can: 3.1 describe different **types of teams** in a health care setting 3.2 explain the characteristics of **team members** 3.3 explain the causes of conflict within a team and how to resolve it.

Range
Types of teams The primary health care team, multidisciplinary teams, temporary teams / task forces. **Team members** Plant, resource investigator, co-ordinator, implementer, completer, finisher.

Learning outcome
The learner will: 4. Understand how to manage time and workload.
Assessment criteria
The learner can: 4.1 describe the **purpose** of the **diary** as a management tool 4.2 explain how the medical administrator can **maintain a manageable workload**.

Range
Purpose To record daily appointments, record a “to do list” for the day, looking ahead and recording events which occur monthly, coordinating the team diaries. **Diary** Paper or electronic. **Maintain a manageable workload** Effective planning using planning aids, time management, contingency planning, delegation.

Learning outcome
The learner will: 5. Understand how to manage and store information in the medical environment.
Assessment criteria
The learner can: 5.1 describe file management systems 5.2 identify the principles of the current Data Protection Act 5.3 describe how the current Data Protection Act principles apply to **patient data** 5.4 describe different **sources** of information used by a medical administrator 5.5 describe the **use** of computerised Patient Administration Systems (PAS).

Range
File management systems Filing classification systems: alphabetical, numerical, chronological, alpha- numerical, geographical, subject and terminal digit. Storage methods: lateral filing cabinets, vertical filing cabinets, horizontal filing cabinets and electronic filing. **Patient data** Manual and computerised. **Sources** Hospital intranet, internet, staff handbooks, databases, organisational policies, medical dictionary, medical secretary's handbook, British National Formulary. **Use** Making out-patient appointments, TCI letters, tracking medical records, audit purposes, demographics, statistical data.

Learning outcome
The learner will: 6. Understand the importance of continuous professional development.
Assessment criteria
The learner can: 6.1 describe different **techniques** used for identifying individual needs for development 6.2 explain the **advantages** of Continuous Professional Development (CPD) to the organisation and the individual.

Range
Techniques Formal and informal feedback, self assessment, training needs analysis, provision of training opportunities, setting clear objectives (SMART targets), completion of CPD log / diary, appraisals, PDR. **Advantages** Individual: increased motivation, promotion opportunities, improved skills and knowledge, passing through pay gateways. Organisation: improved patient care, increased staff retention, better trained staff.

Unit 361 Managing communication in a medical environment

UAN:	**Y/505/1264**
Level:	3
Credit value:	7
GLH:	55
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 accurate and professional standard with 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 outcome
The learner will: 1. Know how to administer meetings in a medical environment.
Assessment criteria
The learner can: 1.1 describe the requirements of different **types of meetings** 1.2 describe the role of **meetings personnel** 1.3 explain meetings **terminology** 1.4 describe the purpose of **meetings documentation**.

Range
Types of meetings Formal, informal, team, case conference, working group. **Meetings personnel** Chair, secretary. **Terminology** standard agenda items (apologies for absence, minutes, matters arising correspondence, AOB), minutes, notice, chair, proposer, seconder, proposal, motion, resolution, item, action, tabled, present, in attendance, quorum, abstention, unanimous. **Meetings documentation** Notice, agenda (including timed agenda), chair's agenda, minutes (narrative, resolution, action), meeting notes.

Learning outcome
The learner will: 2. Be able to summarise and present information for use in a medical environment.
Assessment criteria
The learner can: 2.1 synthesize information from different **sources** 2.2 **present** summarised information in a suitable format.

Range
Sources Continuous prose, text presented in schematic formats, tables, charts and diagrams, instructions and guidelines. **Present** • Use suitable formats to present information: informal report, newsletter, information sheet, itinerary, schedule, draft slide / visual. • Present information for a range of readers to include healthcare colleagues, the general public. • Use paragraphing to give a meaningful structure to documents for the reader. • Use appropriate sentence structure and accurate spelling for both common business vocabulary and medical terminology. • Apply numbering, bullets, headings and schematic layouts to enhance meaning and achieve clarity. • Incorporate pie charts, bar charts, diagrams, line graphs into documents alongside written text.

Learning outcome
The learner will: 3. Be able to design documentation for collecting information and data.
Assessment criteria
The learner can: 3.1 design **documentation** for collecting **information**.

Range
Documentation Questionnaires and evaluation sheets, simple forms and reply slips to accompany standard letters and e-mails, checklists for own use to monitor and record progress. **Information** Qualitative and quantitative.

Learning outcome
The learner will: 4. Be able to produce correspondence.
Assessment criteria
The learner can: 4.1 produce different types of **correspondence** 4.2 use **structure and tone** to guide the reader.

Range
Correspondence Routine and complex emails and faxes, standard letters and circulars for familiar and new contexts, appointment letters, letters of application for medical secretarial / administrative, vacancies. **Structure and tone** Show courtesy and maintain a professional tone through conventional greetings, complimentary closes and careful choice of language within the limitations of their role, use paragraphing and headings to structure a message, apply house style format.

Learning outcome
The learner will: 5. Understand oral communication.
Assessment criteria
The learner can: 5.1 explain the **barriers to communication** 5.2 describe communication **techniques** in **group situations** 5.3 describe **techniques** used in **one-to-one** communication.

Range
Barriers to communication Aggressive behaviour, facial expression, gestures and body postures showing anger, defensiveness, irritation, impatience, boredom, poor listening skills, bereavement, illness, drugs, alcohol, patients and visitors with impairments, second language needs, presence of a third party (interpreter, signer, chaperon, relative), cultural differences and dress needs, attitudes to the opposite sex, environment and location, physical barriers, distance and telephone, lack of non-verbal signals, specialist language and medical terminology, awareness of confidentiality. **Techniques (AC2)** Planning what to say, listening more than speaking, allowing other time to speak and complete the message, clear speech, active listening, summarising to the group at key points, using the agenda or visual aids, moving a discussion on, making suggestions and floating ideas, eye contact, body language and posture used positively when speaking and listening, confirming agreements and decisions, going through the chair in formal meetings. **Group situations** Formal and informal meetings, tele- and videoconferences. **Techniques (AC3)** Non-verbal signals (facial expression, posture, gesture, level of eye contact), active listening, questioning styles, checking, reflecting back, clarifying and summarising, showing empathy, responding to emotive language, assertion, techniques to project confidence and deflect aggression, confirming action, maintaining confidentiality. **One-to-one** Telephone and face-to-face.

Unit 361 Managing communication in a medical environment

Supporting information

Guidance

Learning outcome 1

Learners will gain from practical experience in taking notes at planning or team meetings in either classroom or work-based situations.

Simple notes with actions are often sufficient although tutors should ensure that learners also have practice in recording minutes in a more formal style. For this they will need to work on tenses and writing concisely.

Learning outcome 2

Learners should be familiar with a range of summarising techniques so they can develop their own method of working when selecting information. They should be able to use different strategies to identify information including scanning, highlighting and annotating.

The learner will need to be familiar with informal reports but writing a formal report will not be required in the assessment although it is useful to be aware of the headings used.

Different report formats should be introduced to ensure the learner is confident with set structures and using their own free choice of headings: 3 section (Introduction, Information, Conclusions); Memo report with free choice of headings. In the final assessment, learners will be asked to apply logical structure to given information; they will not be required to supply extensive information from memory. The only exception to this would be a personal review or evaluation report. In preparing for assessment, research reports with an individual interest may be a useful learning tool.

Slides, charts and diagrams should be clear and purposeful; complex graphics and decorative illustrations are not required.

Learners should be aware that reports, newsletters and information sheets are often required for PDF documents for patient readers and the staff intranet.

Itineraries and schedules can be prepared for travellers or delegates to a healthcare event.

Itineraries will not require extensive travel experience or knowledge from the learner but user-friendly, clear documents will be needed so the traveller can see key timings and stages at a glance.

For assessment purposes, learners will not be required to provide medical information or terminology.

Unit 362 Medical word processing

UAN:	**H/505/1266**
Level:	3
Credit value:	9
GLH:	60
Aim:	The aim of this unit is to enable learners to develop the knowledge and skills to accurately produce routine professional documents for the medical environment. They will learn how to interpret relevant information and use a range of word processing techniques to edit, format and print a range of standard documents that are common in a medical environment. Learners will also use mail merge functions to combine information from a data file and produce standard letters. They will also learn the importance of proofreading and how to use appropriate checking methods to produce accurate documents.

Learning outcome
The learner will: 1. Be able to manage electronic files.
Assessment criteria
The learner can: 1.1 create and name folders 1.2 create and save **documents** in named folders 1.3 use appropriate filenames to save medical documents in named folders.

Range
Documents Medical reports, medical referral letters, appointment letters, clinic letters, screening letters, discharge letters, operation lists, questionnaires / forms, notices / information leaflets, journals / newsletters, agendas, minutes of meetings. **Electronic files** Letterheads, letters, information sheets, forms and questionnaires, minutes of meetings, agendas.

Learning outcome
The learner will: 2. Be able to use word processing functions to produce medical documents.
Assessment criteria
The learner can: 2.1 input different types of information 2.2 accurately key in text from handwritten and typewritten drafts 2.3 select and use appropriate **formatting techniques** to present medical documents 2.4 expand abbreviations 2.5 follow written instructions and standard printers' correction signs to edit text 2.6 recall specified **documents** and **edit text** as instructed 2.7 recall and **modify** a **table** within a document 2.8 interpret implied and explicit instructions 2.9 complete work within set timescales.

Range
Types of information Text / numbers, references, dates, subject heading as per instructions, main, headings, medical terminology, special marks (such as urgent, private, confidential, for the attention of), phrases and images from other files and documents, search and replace text, enclosures – instructions implicit within the text, labels (names and addresses), number all pages except the first copy in a letter, number all pages on a multi-page document other than a letter. **Formatting techniques** Change font style and size of selected text, create and apply new styles to achieve suitable presentation, use bold, italic, underline and capitals for emphasis, use initial capitals as instructed, use superscript and subscript, apply borders and shading to a paragraph, apply page borders, use left, right and full justification, adjust margins, insert or remove a hard page break, use drawing tools to add lines or boxes to documents, indent text from left or both margins, use borders of different line type or thickness and shading, create paragraphs with multi-level numbering and bullet points using different formats and styles, increase or reduce line spacing before or after paragraphs, set tabs (centre, right and decimal) including the use of leader dots, arrange text in newspaper columns, modify sections, column and page breaks as required, produce printouts of the newspaper columns showing, tracking and editing changes, use headers and footers, including automatic date and page numbering, insert page numbers as specified in any position and in any style, insert automatic file name and path, insert a symbol, emphasise headings (emboldening, capitals, italics, underline), portrait / landscape, insert a text box, with border of specified size, wrapping text around all sides of the text box, sort data alphabetically, numerically and chronologically, create a table, place and resize images, indicate routing, insert symbols, search and replace text, matching case or whole word. See list in Appendix 12.

Documents

medical reports, medical referral letters , appointment letters, clinic letters, discharge letters, agendas, minutes of meetings, operation lists, questionnaires / forms, notices / information leaflets, journals / newsletters, labels.

Edit text

insert, delete, cut, copy, move and paste text between documents ensuring consistency of font style and size within the main document, change line spacing, use search and replace functions as required, import a graphic and resize to a specified size.

Modify table

Merge and split cells, adjust column width, align column content (left, right, centre, horizontal and vertical, decimal), use upper and lower case, add and delete columns and rows, sort text (into alphabetical, numerical, chronological order), add shading and borders of different line types, hide / show gridlines, change text direction.

Abbreviations

Identify and expand general abbreviations.

See list in Appendix 12.

Learning outcome
The learner will: 3. Be able to use mail merge functions.
Assessment criteria
The learner can: 3.1 create standard medical **documents** from handwritten or typewritten drafts 3.2 insert merge codes into the standard document 3.3 combine and merge information 3.4 print selections of merged documents.

Range
Documents Appointment letters, screening invitations, merged documents eg letters, labels.

Learning outcome
The learner will: 4. Be able to proofread and correct errors in medical documents.
Assessment criteria
The learner can: 4.1 check documents for **accuracy** 4.2 identify and correct **errors** in medical documents.

Range
Accuracy Following instructions, checking work for errors and ensuring that it is accurate and complete. **Errors** Typographical, spelling including medical terminology, grammatical, punctuation, presentation and consistency.

Learning outcome
The learner will: 5. Be able to print documents.
Assessment criteria
The learner can: 5.1 select appropriate **methods** to check documents before printing 5.2 produce screen shots 5.3 print labels 5.4 print **final copies** of documents as instructed.

Range
Methods Spell checker, print preview facilities, grammar and thesaurus facilities, English and mother tongue dictionaries, medical and drug dictionaries, online dictionaries. **Final copies** Letters showing routing where instructed, data file, selected merged documents, document showing merge codes, screen shots showing files / folders, single and multiple-page documents, specific page ranges, labels.

Unit 362 Medical word processing

Supporting information

Guidance

The candidate should be able to use the spell checker, grammar and thesaurus facilities to maintain accuracy.

The candidate should be able to use English and mother tongue dictionaries, medical and drug dictionaries.

Unit 362 Medical word processing

Appendix 6 Abbreviations, spelling, amendment and correction signs, symbols and special characters

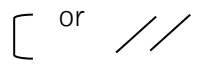
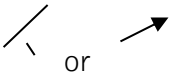
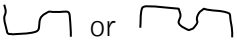
General Abbreviations

You should be able to expand the following abbreviations and spell the words accurately:

abbreviation	spelling
AOB	any other business
approx	approximately
appt(s)	appointment(s)
asap	as soon as possible
dept(s)	department(s)
immed	immediate(ly)
info	information
misc	miscellaneous
necy	necessary
opp(s)	opportunities
poss	possible
pt	patient
recd	received
yr(s)	year(s)
yr(s)	your(s)
days of the week:	eg Mon, Tues
months of the year	eg Jan Feb
words in addresses	eg Rd St Ave Dr Sq Cresc Pl Pk
complimentary closes	eg ffly sincly

All abbreviations will be shown in the typewritten or handwritten draft as open punctuation, unless they appear at the end of a sentence or are followed by actual punctuation marks.

You should be able to distinguish between words that are often confused eg			
affect / effect	are / our	complement / compliment	dependant / dependent
enquiry / inquiry	ensure / insure	practice / practise	to / too
their / there			
and identify how to use the apostrophe for omission and possession eg			
it is –**it's** not true it has – **it's** happened twice you/we/they are – **you're/we're/they're** welcome they/we have – **they've/we've** arrived early		it – the dog wagged **its** tail singular noun – the **girl's** dogs plural noun – the **girls'** dogs plural noun that doesn't end in 's' – the **men's** hats	

Amendment and correction signs			
New paragraph		close up	
run on		leave a space	
insertion (with word above or balloon with arrow)		Let it stand (stet)	in margin
transpose horizontally or balloon with arrow		underscore ie underline	u/s
transpose vertically		lower case	l/c
upper case ie capital letter(s)	u/c		

Punctuation			
Punctuation marks used may include:			
colon	**:**	full stop	**.**
semi-colon	**;**	question mark	**?**
hyphen (no space either side)	**-**	exclamation mark	**!**
dash (one space either side)	**-**	brackets	**( )**
apostrophe	**’**	asterisk	*****
inverted commas	**“ ”**	oblique	/
comma	**,**	ampersand	**&**

Symbols and special characters **(Please note this list is not exhaustive, these are examples only)**	
Accents	è, à
Symbols and special characters	£, @, %, °, ©

Unit 363 Production of medical documents from recorded speech

UAN:	**K/505/1267**
Level:	3
Credit value:	9
GLH:	60
Aim:	The aim of the unit is to enable the learner to develop the knowledge and skills needed to accurately produce professional documentation appropriate for the medical environment from recorded speech. They will learn how to use audio equipment and apply word processing techniques in order to produce routine, non-routine and complex professional documents in a medical context. This unit is for learners who are aiming for employment that involves more complex audio transcription skills within a medical context.

Learning outcome
The learner will: 1. Be able to manage electronic files in a medical environment.
Assessment criteria
The learner can: 1.1 create and name folders 1.2 create and save **documents** in named folders 1.3 recall, rename and save documents in named folders 1.4 recall files containing recorded speech for transcribing.

Range
Documents Medical referral letters, simple medical reports, clinic letters, screening invites, discharge letters, operation notes, notices / information sheets / leaflets, agendas, minutes of meetings, journals / newsletters. **Electronic files** Letterheads, letters, emails, documents containing medical terminology.

Learning outcome
The learner will: 2. Be able to interpret information from written instructions and recorded speech to produce professional medical documents.
Assessment criteria
The learner can: 2.1 key in **information** from recorded speech and written instructions 2.2 locate and key in **information** from another source 2.3 select **stationery** appropriate for document type 2.4 manipulate the **functions** of audio software and **equipment** to transcribe documents 2.5 interpret verbal and written instructions to **format** and present **documents** 2.6 create and **modify tables** from recorded speech 2.7 check documents for **accuracy** and correct **errors** as necessary 2.8 complete work within set timescales.

Range
Information Text / numbers, insert references as dictated including capitalisation and punctuation, insert today's date, insert headings (main, subject, headings containing patient details), special marks (such as urgent, private, confidential, for the attention of), medical terminology, indicate enclosures as implied in the dictation, using an acceptable convention, produce extra copies and indicate routing of copies as dictated, to include insert symbols and special characters, (including accents) See Appendix 1 generic and brand names of drugs. Identify and incorporate information, eg names, addresses and proper nouns from a separate source. **Stationery** Pre-stored templates, letterheads. **Functions** Controls (speed, voice, playback, fast-forward, rewind). **Equipment** Pedals, earphones / headsets. **Format** Emphasise headings (emboldening, capitals, italics, underline), centre text eg heading, over the typing line, emphasise text, using any method, eg bold, italics, underline, change font style and size, paragraphs with numbered or bullet points, portrait, landscape, insertion of headers and footers, adjust margins, align text (left, right, fully justified), change line spacing, insert page numbers on all pages in a document except for a letter, insert automatic filenames and paths. **Documents** Medical reports, referral letters, clinic letters, discharge letters, patient invitation letters, operation notes, notices / information sheets / leaflets, agendas, minutes of meetings.

Modify table

Key in a multi-column with sub-division consistently from recorded speech, text, numbers, add and delete columns and rows, adjust column width vertical and horizontal text, consistently align column content (left, right, centre, decimal), apply borders and shading.

Accuracy

Grammar, correct use of homophones, spelling including medical terminology, generic and brand names of drugs.

Errors

Typographical, spelling, grammatical, punctuation, presentation, consistency.

Learning outcome
The learner will: 3. Be able to print medical documents.
Assessment criteria
The learner can: 3.1 use appropriate **methods** to check documents before printing 3.2 print **final copies** of documents as instructed.

Range
Methods Spell checker, print preview facilities, grammar and thesaurus facilities, English and mother tongue dictionaries, medical and drug dictionaries, online dictionaries. **Final copies** Letters indicating routing, single and multiple-page documents, documents showing file paths, screen shots showing files / folders.

Unit 363 Production of medical documents from recorded speech

Supporting information

Guidance

The candidate should be able to use the spell checker, grammar and thesaurus facilities to maintain accuracy

The candidate should be able to use English and mother tongue dictionaries, medical and drug dictionaries (such as MIMS, BNF) and online dictionaries.

Unit 364 Medical principles for the administrator

UAN:	**M/505/1268**
Level:	3
Credit value:	9
GLH:	78
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 outcome
The learner will: 1. Understand the principles of preventive medicine.
Assessment criteria
The learner can: 1.1 explain the role of **Preventive Medicine (PM)** in a medical environment 1.2 identify **health aspects** routinely targeted by PM 1.3 describe the range of advice given in **areas** targeted by PM 1.4 explain the **role** of the medical administrator in supporting PM 1.5 explain the purpose of **screening and diagnostic tests.**

Range
Preventive Medicine (PM) To include Health Promotion. **Health aspects** Type 2 diabetes, obesity, cardiovascular disease, pulmonary disease, cancer, childhood and adult infections, sexual health.

Areas

Holiday health, cardiovascular disease, pulmonary disease, sexual health, cancer, type 2 diabetes, obesity, childhood and adult infections.

Role

Tasks, limitations.

Screening and diagnostic tests

Maternity services, child health, cancer, cardiovascular and pulmonary disease.

Learning outcome
The learner will: 2. Understand the principles of infection.
Assessment criteria
The learner can: 2.1 state the different **types** of pathogenic microorganisms 2.2 describe the **ways** in which pathogenic microorganisms may enter the human body 2.3 describe the **indications** of infection in the body 2.4 identify the legislation that governs hazardous substances in a medical environment 2.5 explain **methods** of controlling cross infection in a medical environment.

Range
Types Bacteria, viruses, fungi, protozoa. **Ways** Inhalation, ingestion, inoculation, body fluids, via the placenta. **Indications** Signs, symptoms. **Methods** Collection, labelling and storage of specimens containing body fluids, disposal of clinical and general waste, disposal of sharps, removal of spilt body fluids, general cleaning routines.

Learning outcome
The learner will: 3. Understand the role and function of the diagnostic departments.
Assessment criteria
The learner can: 3.1 describe the work of the main **sections** of the **diagnostic departments** 3.2 describe the key job roles in the Diagnostic Departments 3.3 explain the ways in which **individuals** are protected from the harmful effects of radiation.

Range
Diagnostic departments Pathology Department, Clinical Imaging Department. **Sections** • Pathology Department • Microbiology, Haematology, Biochemistry, Histopathology / Cytology, • Clinical Imaging Department, • General / simple X-ray, MRI (Magnetic Resonance Imaging), CAT / CT / (Computerised Axial Tomography), Ultrasound, Positive Emission Tomography, (PET), Bone scans (Scintograms) Ultrasound, use of contrast mediums. **Individuals** Staff and public.

Learning outcome
The learner will: 4. Understand the principles of medical ethics and medical etiquette.
Assessment criteria
The learner can: 4.1 explain medical ethics and medical etiquette 4.2 explain the **importance** of maintaining patient confidentiality 4.3 describe how confidentiality can be maintained within a healthcare environment.

Range
Importance To the patient, to the healthcare staff.

Learning outcome
The learner will: 5. Understand the principles regarding drugs used in medicine.
Assessment criteria
The learner can: 5.1 explain the role and responsibilities of a **pharmacist** 5.2 describe the current acts which control the production, storage and prescribing of drugs in the UK 5.3 identify the **publications** which give information regarding the drugs and medical dressings licensed for use in the UK 5.4 explain the meaning of generic and proprietary drug names 5.5 describe the **classification of drugs.**

Range
Pharmacist Hospital pharmacist, community pharmacist. **Publications** MIMS (Monthly Index of Medical Specialities), BNF (British National Formulary) and the BP (British Pharmacopoeia). **Classification of drugs** See list in Appendix 6.

Learning outcome
The learner will: 6. Understand the anatomy and physiology of the organs of the human body.
Assessment criteria
The learner can: 6.1 identify the main **bones** in the human body 6.2 describe the main **organs** of the human body.

Range
Bones Medical name, position. See list in Appendix 7. **Organs** Medical name, position, function and the system/s to which they belong. See list in Appendix 8.

Unit 364 Medical principles for the administrator

Supporting information

Appendix 7 classification of medicines/drugs - Level 3 Medical principles for the administrator

DRUG CLASSIFICATION	USEAGE
Anaesthetic	Drug for removal of feeling
Analgesic	Drug for relief of pain
Antacid	A substance which neutralises stomach acid
Antibiotic	Drug which kills bacteria
Anticoagulant	Drug which prevents clotting
Antidepressant	Drug which lifts the patient's mood
Anti-emetic	Drug which reduces nausea
Antihistamine	Drug which reduces the production of histamine. Used to treat allergies
Antihypertensive	Drug which reduces blood pressure
Anti-inflammatory	Drug which reduces inflammation
Antipyretic	Drug which reduces fever
Antitussic	Drug which reduces coughing
Bronchodilator	Drug which dilates the bronchial tubes Used in the treatment of asthma
Chemotherapy	Toxic drugs which kill malignant cells
Contraceptive	Drug which prevents conception
Decongestant	Drug which relieves congestion of mucous membranes
Diuretic	Drug which increases the production of urine
Expectorant	Liquid form of drugs which encourages coughing up of secretions from the respiratory tract
Hypnotic	Drug used to induce natural sleep
Myotic	Drug used to constrict the pupil of the eye
Narcotic	Drug derived from opium which will induce deep sleep
Prophylactic	A substance used to prevent disease
Proton pump inhibitor	Drugs which inhibit the production of hydrochloric acid in the stomach
Sedatives	Drugs which lower function of the central nervous system (CNS)
Steroids	Drugs containing hormones
Statins	Drug used to lower cholesterol levels in the blood
Tranquilliser	Drug which reduces anxiety

Appendix 8 List of bones - Medical principles for the administrator

BONE	POSITION
Cranium	Skull –contains brain
Scapula	Shoulder blade
Clavicle	Collar bone
Humerus	Top of arm/upper arm
Radius	Lower arm
Ulna	
Carpals	Wrist/hand bones
Metacarpals	Hand
Phalanges	Fingers and toes
Vertebrae	Spinal column
Coccyx	Bottom of spine
Ribs	Chest
Sternum	Breast bone
Pelvic girdle	Surrounds lower abdomen, contains the hip bones, the femur is attached at the acetabulum forming the hip joint
Femur	Upper leg
Patella	Knee cap
Fibula	Thinner lower leg bone
Tibia	Shin Bone
Tarsals	Ankle /foot bones
Metatarsals	Feet

Appendix 9 List of organs and systems - Medical principles for the administrator

ORGAN	Common Name /Position/Function	BODY SYSTEM
Brain	Controls body functions	Central nervous system
Skin	Outer protective cover of the body	Skin
Spleen	Lies on underside of stomach. Produces antibodies / acts as a defence mechanism and controls the volume of blood circulating	Lymphatic system
Liver	Factory of the body. Breaks down toxins, nitrogenous waste and drugs for removal from the body. Produces bile	Digestive system
Oesophagus	Gullet/food pipe. Transports food from throat to stomach	Digestive system
Stomach	Receives food, commences protein digestion	Digestive system
(Duodenum, Jejunum and Ileum)	Small intestine Long tube from stomach to colon where digestion is completed and most absorption takes place	Digestive system
Colon	Large intestine/Absorbs water and manufactures faeces	Digestive system
Pancreas	Gland below the stomach in the curve of the duodenum which produces insulin and pancreatic juice	Digestive system /Endocrine system
Gall bladder	Lies on underside of liver. Concentrates and stores bile for excretion into duodenum to aid digestion	Digestive system
Pharynx	Throat, back of the nose and mouth	Respiratory system / digestive system
Larynx	Voice box (forms Adam's Apple in the male)	Respiratory system
Trachea	Wind pipe takes air to and from the lungs	Respiratory system
Bronchus	Large airway passages transporting air into the lungs	Respiratory system
Lungs	2 organs lying in the chest in which the exchange of gases takes place during breathing	Respiratory system
Heart	Muscular pump lying between the lungs which pumps to circulate blood around the body.	Cardio-vascular system
Aorta	Main artery of the body. Carries oxygenated blood from the heart to the body	Cardio-vascular system
Superior Vena cava / Inferior Vena Cava	Main veins. Carry de-oxygenated blood from the body back to the heart	Cardio-vascular
Arteries	Blood vessels which usually carry oxygenated blood away from the heart and around the body	Cardio-vascular system
Veins	Blood vessels which usually carry de-oxygenated blood back to the heart	Cardio-vascular system
Kidneys	The 2 organs in the body that produce urine	Urinary system
Ureters	The tubes that connect the kidneys to bladder	Urinary system
Bladder	The organ that holds urine prior to its excretion from the body	Urinary system
Urethra	Tube which carries urine from the bladder to the outside of the body	Urinary system/male reproductive system
Ovaries	Female organs that produce eggs and hormones	Female reproductive system
Fallopian/ uterine tubes	2 tubes, connected to the womb, where fertilization of the egg takes place	Female reproductive system
Uterus	Womb. Organ where the fetus grows	Female reproductive system

Vagina	Birth canal. Organ which connects the womb to the outside of the body	Female reproductive system
Mammary glands	Breasts. 2 organs situated at the front of the chest which produce milk to feed the newborn baby	Female reproductive system
Vulva	External genitalia of the female	Female reproductive system
Penis	Male organ through which the urethra passes	Male reproductive system
Prostate Gland	Male gland, the size of a walnut, which encircles the urethra just below the bladder. It secretes a fluid to make the sperm more mobile and fertile	Male reproductive system
Scrotum	Sac of skin lying outside of the body which contains the testes	Male reproductive system
Testes	Male sex glands which lie in the scrotum and produce sperm and testosterone	Male reproductive system
Epididymes	Male glands which lie above the testes allows sperm to become mature and mobile	Male reproductive system
Vas Deferens	Tube through which sperm passes to be ejaculated from the body	Male reproductive system

Unit 365 Legal aspects of medical administration

UAN:	**K/505/1270**
Level:	3
Credit value:	9
GLH:	51
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 outcome
The learner will: 1. Understand the organisational structure of healthcare in the UK.
Assessment criteria
The learner can: 1.1 describe the organisations which form the structure of the National Health Service 1.2 explain the role of private healthcare.

Learning outcome
The learner will: 2. Understand the role of the healthcare team in the community.
Assessment criteria
The learner can: 2.1 describe the role of **key healthcare staff** working within the community 2.2 describe the **support services** available from the key healthcare staff working within the community.

Range
Key healthcare staff Social worker, GP, nurses (community, psychiatric), midwives, occupational therapists, physiotherapist. **Support services** Assessment, therapies, treatment, referral to other agencies, provision of aids and adaptation, monitoring.

Learning outcome
The learner will: 3. Understand current mental health legislation.
Assessment criteria
The learner can: 3.1 explain the **sections** of the current Mental Health Act.

Range
Sections 131 Voluntary Admission, 136 Place of Safety, Section 4, Section 2, Section 3.

Learning outcome
The learner will: 4. Understand how legal principles affects the patient, employees and the employer within the NHS.
Assessment criteria
The learner can: 4.1 explain the meaning of 'legal duty of care' relating to healthcare professionals 4.2 explain vicarious liability 4.3 explain medical negligence and its **implications** 4.4 explain the tort of trespass to the person with reference to **consent**.

Range
Implications To the patient, the NHS employee, the NHS. **Consent** To / for examination and treatment.

Learning outcome
The learner will: 5. Understand current workplace legislation.
Assessment criteria
The learner can: 5.1 describe a **written contract of employment** 5.2 explain current discrimination legislation 5.3 explain **legislation** relating to health and safety at work.

Range
Written contract of employment Purpose and terms. **Legislation** HASAWA, RIDDOR, Health & Safety (Display screen equipment) Regulations, COSHH.

Learning outcome
The learner will: 6. Understand how to maintain and protect patient rights.
Assessment criteria
The learner can: 6.1 explain **patient rights** 6.2 explain how **legislation and regulations** protect patient information 6.3 explain the role of a medical administrator in the safeguarding of patient confidentiality 6.4 explain the current NHS complaints procedure.

Range
Patient rights As outlined in the NHS Constitution. **Legislation and regulations** Data protection, freedom of information, Caldicott Guidelines.

Unit 365 Legal aspects of medical administration

Supporting information

Guidance

Learning outcome 2

Services - other agencies eg meals on wheels, etc

Learning outcome 4

The significance of a legal duty of care in relation to health professionals, the health professional is duty bound to act in the patients best interests at all times and could be committing negligence they fail in that duty. (In legal terms a duty of care arises when an individual can reasonably foresee that his / her actions or lack of action could result in harm)

Vicarious liability with regard to the actions of the employee. The employer can be sued or taken to court for the action or wrong doing of their employee in the course of their employment, even if that employee has been specifically forbidden to do whatever caused the wrongdoing.

The **legal definition of negligence** as a tort (civil law): The requirement for negligence to be proven is:

- the health professional owed the patient a duty of care
- the duty was breached
- the health professional caused the breach
- foreseeable harm was done to the patient.

Unit 405 Support environmental sustainability in a business environment

UAN:	**R/506/1954**
Level:	4
Credit value:	4
GLH:	38
Relationship to NOS:	Business & Administration (2013) National Occupational Standards.
Assessment requirements specified by a sector or regulatory body:	Skills CFA Assessment Strategy Competence Units (S/NVQ)
Aim:	This unit aims to develop the knowledge and skills required to support environmental sustainability in a business environment and introduces learners to the principles supporting environmental sustainability in a business environment. Upon completion of this unit, learners will be able to implement best practice in environmental sustainability in a business environment.

Learning outcome
The learner will: 1. Understand the principles supporting environmental sustainability in a business environment.
Assessment criteria
The learner can: 1.1 describe current legislation in relation to environmental sustainability in a business environment 1.2 explain government incentives that support environmental sustainability in a business environment 1.3 analyse the relationship between environmental sustainability and corporate social responsibility 1.4 explain the health and safety considerations for environmental sustainability and waste management 1.5 explain techniques to evaluate the impact of an organisation's environmental and sustainability policies and procedures.

Assessment Guidance
For this learning outcome robust research will need to be completed against the assessment criteria. The report should demonstrate understanding of current legislation and incentives. Use your own organisation to complete your research or research an organisation of your choice **Evidence may be supplied by:** • report • professional discussion • questioning.

Learning outcome
The learner will: 2. Be able to implement best practice in environmental sustainability in a business environment.
Assessment criteria
The learner can: 2.1 identify the environmental standards that are relevant to an organisation 2.2 evaluate the impact of an organisation's business on its environment 2.3 promote a culture of efficient consumption of energy in line with an organisation's energy management policies 2.4 establish procedures to minimise waste and maximise the recycling of materials 2.5 establish procedures to meet hazardous waste regulations 2.6 adhere to organisational policies and procedures, legal and ethical requirements when implementing best practice in a business environment.

Assessment Guidance
Evidence may be supplied by: • report • product (procedures) • witness testimony • questioning.

Unit 405 Support environmental sustainability in a business environmenttainability in a business environment

Supporting information

Guidance

For this unit the candidate's report can outline how they worked through the unit, which may also include additional evidence from, eg witness testimony, as well as product. A report at this level would be in excess of 2000 words.

Unit 406 Resolve administrative problems

UAN:	**D/506/1956**
Level:	4
Credit value:	6
GLH:	56
Relationship to NOS:	Business & Administration (2013) National Occupational Standards: • CFABAG126 Plan how to solve business problems • CFABAG127 Solve business problems.
Assessment requirements specified by a sector or regulatory body:	Skills CFA Assessment Strategy Competence Units (S/NVQ)
Aim:	This unit aims to develop the knowledge and skills required to resolve administrative problems and introduces learners to the principles underpinning the resolution of administrative problems. Upon completion of this unit, learners will be able to identify and resolve administrative problems.

Learning outcome
The learner will: 1. Understand the principles underpinning the resolution of administrative problems.
Assessment criteria
The learner can: 1.1 evaluate the effectiveness of different types of information on an administrative function 1.2 explain the basis for selecting tools, techniques and strategies to analyse administrative functions 1.3 explain the constraints attached to the use of resources needed to resolve administrative problems 1.4 explain how to apply risk assessment and management techniques to identify and resolve administrative problems 1.5 analyse the effectiveness of different techniques used to resolve administrative problems.

Assessment guidance/evidence requirements
To evaluate and analyse in this Learning Outcome the candidate will need to complete research into the functions, tools, techniques and strategies available to them. Some techniques include: • Cause and Effect Analysis • Root Cause Analysis • Impact Analysis • GANTT Chart • 6 Stage Model. The candidate may wish to research these and others to completely understand the resolution of problems. **Evidence may be supplied by:** • report • professional discussion • questioning.

Learning outcome
The learner will: 2. Be able to identify administrative problems.
Assessment criteria
The learner can: 2.1 collect information relevant to the administrative problem 2.2 use analytical techniques that are appropriate to the administrative problem 2.3 clarify whether an administrative problem is recurrent, intermittent or a sole instance 2.4 identify patterns of issues and problems 2.5 identify the likely cause of an administrative problem.

Range
To complete this learning outcome the candidate will need to recognise the size of the problem: • simple – complex • hard – soft • urgent – non-urgent. **Evidence may be supplied by:** • report • product • professional discussion • questioning.

Learning outcome
The learner will: 3. Be able to resolve administrative problems.
Assessment criteria
The learner can: 3.1 select a strategy that is appropriate for the nature, scale, seriousness and priority of the administrative problem 3.2 develop a plan that addresses the administrative problem whilst minimising disruption to business 3.3 identify success criteria that are capable of measuring the effectiveness of solutions to solve administrative problems 3.4 implement a problem-solving plan within the agreed timescale and constraints 3.5 take action to ensure that systems and processes are capable of preventing future reoccurrences 3.6 evaluate the effectiveness of problem solving activities 3.7 adhere to organisational policies and procedures, legal and ethical requirements when resolving administrative problems.

Assessment guidance/evidence requirements
Strategies not already mentioned above could include: • Cost Benefit Analysis • Failure Mode and Effects Analysis (FMEA) • Means-End Analysis **Planning** • 8D Problem-Solving Process • Plan-Do-Check-Act (PDCA) **Evidence may be supplied by:** • product • report • professional discussion • witness testimony • questioning.

Unit 406 Resolve administrative problems

Supporting information

Guidance

For this unit the candidate's report can outline how they worked through the unit, which may also include additional evidence from, eg witness testimony, as well as product. A report at this level would be in excess of 2000 words.

Unit 407 Prepare specifications for contracts

UAN:	**H/506/1957**
Level:	4
Credit value:	4
GLH:	23
Relationship to NOS:	Business & Administration (2013) National Occupational Standards: • CFABAF132 Prepare specifications for contracts.
Assessment requirements specified by a sector or regulatory body:	Skills CFA Assessment Strategy Competence Units (S/NVQ)
Aim:	This unit aims to develop the knowledge and skills required to prepare specifications for contracts and introduces learners to the principles supporting the preparation of specifications for contracts. Upon completion of this unit, learners will be able to prepare specifications for contracts.

Learning outcome
The learner will: 1. Understand the principles supporting the preparation of specifications for contracts.
Assessment criteria
The learner can: 1.1 explain the scope of **contract specifications** 1.2 explain the roles and interests of those who should be involved in a tender process 1.3 analyse the legal implications of a range of types of contracts and agreements 1.4 explain the requirements of confidentiality and data protection 1.5 evaluate the risks associated with procurement and tendering processes 1.6 explain the basis for the design of a tender evaluation process.

Assessment guidance/evidence requirements
Four elements of **contract specifications** include**:** • offer • acceptance • consideration • the intention to create legal relations. **Types of contract include:** • contract of service (contract of employment) • contract for services (commercial ie cleaning services). **Procurement processes include:** • who to use as a supplier • what kind of contract terms will be required • what constraints/restrictions on purchasing power. **Evidence may be supplied by:** • research report • professional discussion • questioning.

Learning outcome
The learner will: 2. Be able to prepare specifications for contracts.
Assessment criteria
The learner can: 2.1 confirm the requirements for the contract specification 2.2 draft contract specifications that meet the requirements including post-contractual requirements 2.3 specify the parameters of the contract in line with the requirements 2.4 provide sufficient information to enable potential suppliers to develop proposals that are capable of meeting the specification 2.5 define objective selection criteria to evaluate tender proposals 2.6 establish a selection process that meets organisational requirements 2.7 adhere to organisational policies and procedures, legal and ethical requirements when preparing specifications for contracts.

Assessment guidance/evidence requirements
Evidence may be supplied by: • product • witness testimony • professional discussion • report • questioning.

Unit 407 Prepare specifications for contracts

Supporting information

Guidance

For this unit the candidate's report can outline how they worked through the unit, which may also include additional evidence from, eg witness testimony, as well as product. A report at this level would be in excess of 2000 words.

Unit 408 Manage events

UAN:	**M/506/1959**
Level:	4
Credit value:	6
GLH:	49
Relationship to NOS:	Business & Administration (2013) National Occupational Standards: • CFABAA312 Organise and coordinate event
Assessment requirements specified by a sector or regulatory body:	Skills CFA Assessment Strategy Competence Units (S/NVQ)
Aim:	This unit aims to develop the knowledge and skills required to manage events. Upon completion of this unit, learners will develop an understanding of the management of an event, and will be able to manage events at all stages, including the planning stage, the execution stage and the follow-up stage.

Learning outcome
The learner will: 1. Understand the management of an event.
Assessment criteria
The learner can: 1.1 explain how organisational objectives will be met by an event 1.2 explain the flexibilities and constraints of an event's budget 1.3 evaluate the use of project management techniques in event management 1.4 analyse how models of contingency and crisis management can be applied to event management 1.5 analyse the use of customer relationship management (CRM) systems to attract attendees 1.6 evaluate the application of the principles of logistics to event management 1.7 describe the insurance requirements of an event.

Assessment guidance/evidence requirements
Techniques include: • The Iron Triangle of Project Management • The Planning Cycle • SWOT Analysis • Risk Analysis • Gantt Charts • Critical Path Analysis. **Models:** • risk/impact probability chart • issue management log. **Evidence may be supplied by:** • report • professional discussion • questioning.

Learning outcome
The learner will: 2. Be able to manage the planning of an event.
Assessment criteria
The learner can: 2.1 identify the purpose of an event and the key messages to be communicated 2.2 identify target attendees for an event 2.3 Assess the impact of an event on an organisation and its stakeholders 2.4 establish requirements for resources, location, technical facilities, layout, health and safety 2.5 identify how event-related risks and contingencies will be managed 2.6 develop an event plan that specifies objectives, success and evaluation criteria 2.7 make formal agreements for what will be provided, by whom and when 2.8 determine methods of entry, security, access and pricing.

Assessment guidance/evidence requirements
Events for this unit may include but are not limited to: • conference • wedding • launch of a new product/service • sporting event. **Evidence may be supplied by:** • product • witness testimony • report • professional discussion • questioning.

Learning outcome
The learner will: 3. Be able to manage an event.
Assessment criteria
The learner can: 3.1 manage the allocation of resources in accordance with the event management plan 3.2 respond to changing circumstances in accordance with contingency plans 3.3 deliver agreed outputs within the timescale 3.4 manage interdependencies, risks and problems in accordance with the event management plan 3.5 comply with the venue, insurance and technical requirements 3.6 apply the principles and good practice of customer care when managing an event 3.7 adhere to organisational policies and procedures, legal and ethical requirements when managing an event.

Assessment guidance/evidence requirements
Evidence may be supplied by: • product • witness testimony • report • questioning.

Learning outcome
The learner will: 4. Be able to follow up an event.
Assessment criteria
The learner can: 4.1 ensure that all post-event leads or actions are followed up 4.2 optimise opportunities to take actions that are likely to further business objectives 4.3 evaluate the effectiveness of an event against agreed criteria.

Assessment guidance/evidence requirements
Evidence may be supplied by: • product • witness testimony • report • questioning.

Unit 408 Manage events

Supporting information

Guidance

For this unit the candidate's report can outline how they worked through the unit, which may also include additional evidence from, eg witness testimony, as well as product. A report at this level would be in excess of 2000 words.

Appendix 10 Sources of general information

The following documents contain essential information for centres delivering City & Guilds qualifications. They should be referred to in conjunction with this handbook. To download the documents and to find other useful documents, go to the **Centres and Training Providers homepage** on **www.cityandguilds.com**.

Centre Manual - Supporting Customer Excellence contains detailed information about the processes which must be followed and requirements which must be met for a centre to achieve 'approved centre' status, or to offer a particular qualification, as well as updates and good practice exemplars for City & Guilds assessment and policy issues. Specifically, the document includes sections on:

- The centre and qualification approval process
- Assessment, internal quality assurance and examination roles at the centre
- Registration and certification of candidates
- Non-compliance
- Complaints and appeals
- Equal opportunities
- Data protection
- Management systems
- Maintaining records
- Assessment
- Internal quality assurance
- External quality assurance.

Our Quality Assurance Requirements encompasses all of the relevant requirements of key regulatory documents such as:

- Regulatory Arrangements for the Qualifications and Credit Framework (2008)
- SQA Awarding Body Criteria (2007)
- NVQ Code of Practice (2006)

and sets out the criteria that centres should adhere to pre and post centre and qualification approval.

Access to Assessment & Qualifications provides full details of the arrangements that may be made to facilitate access to assessments and qualifications for candidates who are eligible for adjustments in assessment.

The **centre homepage** section of the City & Guilds website also contains useful information on such things as:

- **Walled Garden:** how to register and certificate candidates on line
- **Qualifications and Credit Framework (QCF)**: general guidance about the QCF and how qualifications will change, as well as information on the IT systems needed and FAQs
- **Events**: dates and information on the latest Centre events
- **Online assessment**: how to register for e-assessments.

City & Guilds

Believe you can

www.cityandguilds.com

Useful contacts

UK learners **General qualification information**	E:**learnersupport@cityandguilds.com**
International learners General qualification information	F: +44 (0)20 7294 2413 E: **intcg@cityandguilds.com**
Centres Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results	F: +44 (0)20 7294 2413 E: **centresupport@cityandguilds.com**
Single subject qualifications Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change	F: +44 (0)20 7294 2413 F: +44 (0)20 7294 2404 (BB forms) E: **singlesubjects@cityandguilds.com**
International awards Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports	F: +44 (0)20 7294 2413 E: **intops@cityandguilds.com**
Walled Garden Re-issue of password or username, Technical problems, Entries, Results, e-assessment, Navigation, User/menu option, Problems	F: +44 (0)20 7294 2413 E: **walledgarden@cityandguilds.com**
Employer Employer solutions, Mapping, Accreditation, Development Skills, Consultancy	T: +44 (0)121 503 8993 E: **business@cityandguilds.com**
Publications Logbooks, Centre documents, Forms, Free literature	F: +44 (0)20 7294 2413

Every effort has been made to ensure that the information contained in this publication is true and correct at the time of going to press. However, City & Guilds' products and services are subject to continuous development and improvement and the right is reserved to change products and services from time to time. City & Guilds cannot accept liability for loss or damage arising from the use of information in this publication.

If you have a complaint, or any suggestions for improvement about any of the services that we provide, email: feedbackandcomplaints@cityandguilds.com

City & Guilds Group

The City & Guilds Group is a leader in global skills development. Our purpose is to help people and organisations to develop their skills for personal and economic growth. Made up of City & Guilds, City & Guilds Kineo, The Oxford Group and ILM, we work with education providers, businesses and governments in over 100 countries.

Copyright

The content of this document is, unless otherwise indicated, © The City and Guilds of London Institute and may not be copied, reproduced or distributed without prior written consent. However, approved City & Guilds centres and candidates studying for City & Guilds qualifications may photocopy this document free of charge and/or include a PDF version of it on centre intranets on the following conditions:

- **centre staff may copy the material only for the purpose of teaching candidates working towards a City & Guilds qualification, or for internal administration purposes**
- **candidates may copy the material only for their own use when working towards a City & Guilds qualification**

The *Standard Copying Conditions* (see the City & Guilds website) also apply.

Please note: National Occupational Standards are not © The City and Guilds of London Institute. Please check the conditions upon which they may be copied with the relevant Sector Skills Council.

Published by City & Guilds, a registered charity established to promote education and training

City & Guilds
1 Giltspur Street
London EC1A 9DD
F +44 (0)20 7294 2413
www.cityandguilds.com