

SPECIFICATION

**IAO LEVEL 2 DIPLOMA IN
BUSINESS ADMINISTRATION**

QUALIFICATION NUMBER: 601/3515/3

Innovate Awarding is an Ofqual regulated awarding organisation with an innovative and dynamic approach. We develop off-the-shelf, customised and fully bespoke qualifications across a growing number of sectors – all on the Regulated Qualifications Framework (RQF).

Our portfolio is always growing and we currently have qualifications in the following sectors:

**ACTIVE LEISURE
BUSINESS AND MANAGEMENT
CATERING CHILDCARE
EMPLOYABILITY
RETAIL**

**HEALTH AND SOCIALCARE
HOSPITALITY AND
IT
LOGISTICS
EDUCATION AND TRAINING**

We currently offer over 120 qualifications and we're continuously developing and diversifying our portfolio. Please visit our website regularly to keep up-to-date www.innovateawarding.org

This document will be updated if there are any changes so it is important to make sure you are working from the most up-to-date version, which is available to download from our website

This specification also provides details on administration, quality assurance policies and the requirements as well as responsibilities that are associated with the delivery of vocational qualifications.

Innovate Awarding is an Ofqual-regulated Awarding Organisation in England.

If you have any questions regarding qualifications in general, aspects of specific qualifications or our quality assurance policies and procedures, visit our website where a lot more information is available.

If you cannot find what you are looking for on our website, please call or email our customer support team:

Telephone: 0117 314 2800

Email: contactus@innovateawarding.org

*"WE WORK WITH A WIDE
VARIETY OF
ORGANISATIONS SUCH AS
EMPLOYERS, TRAINING
PROVIDERS, FE COLLEGES
AND
SECTOR SKILLS
COUNCILS AND
DEVELOP OFF-THE-
SHELF, CUSTOMISED
AND BESPOKE
QUALIFICATIONS."*

Qualification summary

Qualification Accreditation Number (QAN)	601/3515/3
Qualification review date	31 st March, 2022
Guided Learning Hours (GLH)	Minimum 229 hours
Total Qualification Time (TQT)	Minimum 450 hours
RQF level	2
Qualification credit value	45 credits
Minimum credits at/above level	36 credits
Assessment requirements	Portfolio of Evidence

This qualification is internally assessed and internally quality assured by Centre staff and externally quality assured by Innovate Awarding External Quality Advisor (EQAs).

Aims and objectives of the qualification

The aim of this qualification is to contribute to the skills, knowledge and overall performance of Business Administration for a learner. It provides an insight into the principles and processes of Business and Administration and will aid career development with both knowledge and skills areas required in Business Administration.

This RQF competence-based qualification is designed for those people who are involved in Business and Administration as their primary work activity and are seeking a career in Business Administration and wish to take the first steps towards professional qualifications. In addition, it is for learners who wish to gain recognition of their skills, knowledge and experience in Business Administration.

Entry guidance

There are no formal entry requirements for this qualification. This qualification is suitable for those who work within a number of industries and job roles. It provides Learners with an opportunity to demonstrate their competence and knowledge in a wide range of job roles.

Progression opportunities Learners who achieve this qualification could progress into or within employment in a number of business administration roles and/or continue their study in this or other areas. Learners who complete this qualification may go on to further study in related areas such as:

- Level 3 Diploma in Business Administration
- Level 2 Diploma in Team Leading

Funding For details on eligibility for government funding please refer to the following websites:
<http://www.education.gov.uk/section96/>
<https://www.gov.uk/government/organisations/education-and-skills-funding-agency>

INNOVATE AWARDING

When you work with Innovate Awarding, you're working with an awarding organisation that sets itself apart – a dynamic company with a collaborative approach to doing business. We're consultative and innovative...everything that our customers say they want an awarding organisation to be.

We're easy to work with, committed and passionate about exceeding our customers' expectations. We're not tied down by bureaucracy and red tape and can think outside the box and respond quickly to our customers' needs.

We have a Performance Pledge that details guaranteed response times. Copies of these can be found on our website www.innovateawarding.org

FEEDBACK

Your feedback is very important to us. We're always open to suggestions when it comes to enhancing and improving our services, products and systems. Email us at contactus@innovateawarding.org or call us on 0117 314 2800.

COMPLAINTS

If we do get things wrong, we'll make every effort to resolve your issues quickly and efficiently. If you'd like to raise a formal complaint, then we recommend you read our Complaints Procedure which can be found on our website.

FEES

Our fees structure is transparent and straightforward. Our fees are published on our website in a clear format with no hidden charges. Unlike other awarding organisations, we do not charge an annual centre fee. Visit our website to compare our fees.

ENQUIRIES AND APPEALS

We recognise that sometimes decisions are made that a centre (or learner) may wish to appeal. We have an Enquiries and Appeals Policy and Process on our website that sets out guidelines on grounds for appeal and the process.

DATA PROTECTION

Innovate Awarding takes the protection of data seriously; we have a data protection statement outlining how we and our centres, comply with the current legislation on data protection. This statement can be found on our website.

EQUALITY AND DIVERSITY

Innovate Awarding is committed to giving everyone who wants to gain one of our qualifications an equal opportunity of achieving it in line with current UK legislation (Equality Act 2010) and EU directives.

Centres are required, as conditions of approval, to use an equality and diversity policy that works together with ours and that they maintain an effective complaint and appeals process. We expect centres to tell learners how to find and use their own equality and diversity and appeals processes. For information, please visit our website.

REASONABLE ADJUSTMENT AND SPECIAL CONSIDERATION

All learners must be treated fairly and equally and be given every opportunity to achieve our/the qualifications. A copy of our policy on Reasonable Adjustments and Special Considerations, and application form, can be found on our website.

MALPRACTICE AND MALADMINISTRATION

Innovate Awarding has a responsibility to do everything it can to prevent any malpractice or maladministration from occurring, and where it has already occurred, ensuring action is taken proportionate to the gravity and scope of the occurrence.

A copy of our policy and procedure on Malpractice and Maladministration is available on our website.

RECOGNITION OF PRIOR LEARNING (RPL)

RPL recognises how the contribution of a learner's previous experience could contribute to a qualification or unit. Innovate Awarding have produced guidance on RPL and this can be found within our Information and Guidance for Centres on our website

Please note the above is not a comprehensive guide to running qualifications. Once approved centres must adhere to the Centre Agreement and Information and Guidance for Centres.

THE REGULATED QUALIFICATIONS FRAMEWORK (RQF)

WHAT IS THE RQF?

The Regulated Qualifications Framework (RQF) is an Ofqual regulated system of cataloguing qualifications. Qualifications on the RQF can be found by their size or level. Qualifications at a given level can differ depending on their content and purpose.

All of Innovate Awarding's qualifications are on the RQF.

QUALIFICATION LEVEL

The level reflects the challenge or difficulty of the qualification. There are eight levels of qualification from 1 to 8, supported by three "Entry" levels.

QUALIFICATION SIZE

The size of a qualification reflects the estimated total amount of time it would take the average learner to study and be assessed. The size of a qualification is expressed in terms of Total Qualification Time (TQT). The time spent being taught or supervised, rather than studying alone, is the Guided Learning Hours (GLH).

Qualifications can sit at different levels but require similar amounts of study and assessment. Similarly, qualifications at the same level can take different amounts of time to complete.

SKILLS CFA ASSESSMENT STRATEGY COMPETENCE UNITS (S/NVQ) FOR BUSINESS ADMINISTRATION, CUSTOMER SERVICE AND MANAGEMENT AND LEADERSHIP

1. INTRODUCTION

This Assessment Strategy provides principles and guidance to Awarding Organisations for the assessment of competence-based units and qualifications (including Scottish Vocational Qualifications and National Vocational Qualifications) within Business Administration¹, Customer Service and Management and Leadership in England, Scotland, Wales and Northern Ireland.

This document outlines Skills CFA principles in regards to:

- external quality control of assessment
- requirements of assessor and verifiers
- evidence
- employer direct model

These principles are in addition to the generic criteria that Awarding Organisations must meet for delivery of qualifications as required by the qualification regulators, for example Ofqual's Regulatory Arrangements for the Qualifications and Credit Framework and any regulatory requirements specified by the SQA Accreditation.

This strategy should only be used for the assessment of competence-knowledge based units and qualifications. Awarding Organisations may assess knowledge-only units as they see fit.

2. EXTERNAL QUALITY CONTROL OF ASSESSMENT

The quality of the assessment process is the responsibility of Awarding Organisations. However, Skills CFA encourages flexibility and innovation of approach, alongside robust systems to support quality control. Awarding Organisations are also encouraged to detail their approach to external verification, risk assessment and data requests.

2.1 EXTERNAL VERIFICATION

- Awarding Organisations are responsible for the competence of external verifiers. It is the responsibility of Awarding Organisations to monitor centres' performance in accordance with regulatory requirements.
- Awarding Organisations must consistently apply external verification processes at all assessment centres delivering competence-based qualifications. These should be underpinned by standard risk assessment and risk management processes.

2.2 RISK ASSESSMENT

- Awarding Organisations must carry out standard risk assessments for all qualification assessment centres that are delivering competence-based qualifications. Identified risks must be managed appropriately.
- Awarding Organisations must retain evidence to prove that a risk assessment has been carried out for each approved centre, and that a strategy to minimise any identified risk has been implemented.
- Data requests
- Each quarter, Awarding Organisations must provide registration and achievement data at all qualification levels (1 to 7) and unit levels (where possible) to Skills CFA.

3. REQUIREMENTS OF ASSESSORS, EXTERNAL AND INTERNAL VERIFIERS

Candidates may be assessed, moderated or verified at work either by several appointed individuals.

3.1 ASSESSORS

The primary responsibility of an Assessor is to assess candidates' performance in a range of tasks and to ensure the evidence submitted by the candidate meets the requirements of the assessment criteria.

It is important that an assessor can recognise occupational competence as specified by the national standard. Assessors therefore need to have a thorough understanding of assessment and quality assurance practices, as well as have in-depth technical understanding related to the qualifications for which they are assessing candidates.

To be able to assess candidates, Assessors must:

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to assess candidates undertaking competence-based units and qualifications. Assessors holding older qualifications must be able to demonstrate that they are assessing to the current standards.

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. An Assessor working towards an appropriate qualification must ensure their decisions are countersigned by a suitably-qualified assessor/verifier and should be supported by a qualified assessor throughout their training period.
- be "occupationally competent". Assessors must provide current evidence of competence, knowledge and understanding in the areas to be assessed. This will normally be achieved through demonstrating competence in the roles which are to be assessed or demonstrated by relevant experience and continuing professional development (CPD) which may include the achievement of qualifications relevant to the areas being assessed.

- have a full and current understanding of the units of competence and requirements of the qualifications being assessed, including the quality of assessment and the assessment process.

It is the responsibility of approved centres to select and appoint assessors.

3.2 EXTERNAL QUALITY ASSURER (EQA)

The primary responsibility of EQAs is to assure quality of internal verification and assessments across the centres for which they are responsible. EQAs must have a thorough understanding of quality assurance and assessment practices, as well as in-depth technical knowledge related to the qualifications that they are externally verifying.

EQAs must:

- hold an appropriate qualification as specified by the appropriate regulatory authority, confirming their competence to verify competence-based assessments. EQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If EQAs are working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified EQA³ and should be supported by a qualified EQA throughout their training period.
- be occupationally competent. EQAs must demonstrate sufficient and current understanding of the qualifications to be verified and know how they are applied in business.
- demonstrate competent practice in external verification of assessment and demonstrate understanding of the principles and practices of external verification of assessment, including the quality of assessment and the assessment process.

It is the responsibility of the awarding body to select and appoint EQAs.

3.3 INTERNAL QUALITY ASSURER (IQA)

A primary responsibility of IQAs is to assure the quality and consistency of assessments by the assessors for whom they are responsible. IQAs therefore need to have a thorough understanding of quality assurance and assessment practices, as well as sufficient technical understanding related to the qualifications that they are internally verifying. It will be the responsibility of the approved centre to select and appoint IQAs.

IQAs must:

- hold an appropriate qualification, as specified by the appropriate regulatory authority, confirming their competence to internally verify competence-based assessments and candidates. IQAs holding older qualifications must be able to demonstrate that they are verifying to the current standards;

OR

- be working toward an appropriate qualification, as specified by the appropriate regulatory authority. If an IQA is working towards an appropriate qualification, their decisions must be countersigned by a suitably qualified IQA⁵ and should be supported by a qualified IQA throughout their training period.
- be “occupationally competent. IQAs must demonstrate sufficient and current understanding of the qualifications to be internally verified and know how they are applied in business.
- demonstrate competent practice in internal verification of assessment and demonstrate understanding of the principles and practices of internal verification of assessment, including the quality of assessment and the assessment process.

Skills CFA and awarding organisations requires all assessors, moderators and verifiers to maintain current Business Administration, Customer Service and Management and Leadership competence to deliver these functions. Skills CFA recognises this can be achieved in many ways. However, such information must be formally recorded in individual CPD records that are maintained in assessment centres.

EVIDENCE

4.1 EVIDENCE FROM WORKPLACE PERFORMANCE

- Evidence of occupational competence of all competence units at any level, should be generated and collected through performance under workplace conditions. This includes the knowledge-based learning outcomes and assessment criteria of the competence units.
- These conditions would be those typical to the candidate's normal place of work. The evidence collected under these conditions should also be as naturally occurring as possible. It is accepted that not all employees have identical workplace conditions and therefore there cannot be assessment conditions that are identical for all candidates. However, assessors must ensure that, as far as possible, the conditions for assessment should be those under which the candidate usually works.

4.2 SIMULATION

- Simulation can be applied to all units listed in Appendix B.
- Where simulation is used for units at Level 2 and above, it should only form a small part of the evidence for the qualification.
- Evidence may be produced through simulation solely in exceptional circumstances. The exceptional circumstances, under which simulation is possible, are those situations that are not naturally or readily occurring, such as response to emergencies.
- Simulation must be undertaken in a 'realistic working environment' (RWE). A RWE is "an environment which replicates the key characteristics in which the skill to be assessed is normally employed". The RWE must provide conditions the same as the normal day-to-day working environment, with a similar range of demands, pressures and requirements for cost-effective working. Guidelines for using RWE can be found in Appendix A.

4. EMPLOYER DIRECT MODEL

Skills CFA encourages the use of an employer direct model. The employer direct model is where colleagues, supervisors and/or managers in the workplace are involved in the assessment process.

In order to use the employer direct model:

AN ORGANISATION MUST:

- have staff who have achieved, or be working towards achieving, appropriate regulatory body approved unit qualifications for assessment, moderation or verification.

OR

seek guidance and approval from an awarding organisation to demonstrate that they have:

- appropriate processes in place to facilitate assessment, moderation or verification functions
- carried out 100% mapping of the trainer, supervisor or managers' assessment, moderation or verification skills and knowledge to the National Occupational Standards upon which the qualifications above are based.
- agree the mapping process with the awarding organisation/body involved
- demonstrate an equivalent level of rigour and robustness as the achievement of the unit qualification.

An Awarding Organisation must:

- offer this model to employers only.
- supply information on the requirements for internal and external moderation/verification activities to assessment centres.

Skills CFA and awarding organisations requires all assessors, moderators and verifiers to maintain current Business Administration, Customer Service and Management and Leadership competence to deliver these functions. Skills CFA recognises this can be achieved in many ways. However, such information must be formally recorded in individual continual professional development (CPD) records that are maintained in assessment centres.

5. APPENDIX A – REALISTIC WORKING ENVIRONMENT GUIDELINES

Realistic Working Environment (RWE) can be applied to all the units in Appendix B:

It is essential that organisations wishing to operate a RWE operate in an environment which reflects a real work setting. This will ensure that any competence achieved in this way will be sustained in real employment.

To undertake the assessment in a RWE the following guidelines must be met:

1. the RWE is managed as a real work situation
2. assessment must be carried out under realistic business pressures
3. all services that are carried out should be completed in a way, and to a timescale, that is acceptable in business organisations
4. candidates must be expected to achieve a volume of work comparable to normal business practices
5. the range of services, products, tools, materials and equipment that the candidates use must be up to date and available
6. account must be taken of any legislation or regulations in relation to the type of work that is being carried out
7. candidates must be given workplace responsibilities to enable them to meet the requirements of the units
8. customer perceptions of the RWE is similar to that found in the work situation being represented
9. candidates must show that their productivity reflects those found in the work situation being represented.

6. APPENDIX B – SIMULATION: A LIST OF UNITS

Simulation can only be applied to the following competence units:

BUSINESS ADMINISTRATION

Skills CFA	Unit title	Level
B&A 3	Work with others in a business environment	1
B&A 4	Health and safety in a business environment	1
B&A 5	Manage time and workload	1
B&A 6	Use a telephone and voicemail system	1
B&A 7	Prepare text from notes	1
B&A 8	Meet and welcome visitors in a business	1
B&A 9	Handle mail	1
B&A 10	Use office	1

CUSTOMER SERVICE

Skills CFA	Unit title	Level
CS	Communication in customer service	1
CS	Record details of customer service problems	1
CS	Deal with customer queries, requests and problems	1

MANAGEMENT AND LEADERSHIP

Skills CFA	Unit title	Level
M&L 17	Manage conflict within a team	3
M&L 31	Discipline and grievance management	4
M&L 44	Manage redundancy and redeployment	4

SKILLS CFA ASSESSMENT STRATEGY

2010 SALES STANDARDS

INTRODUCTION

- 1.1 The Sales Assessment Strategy is designed to provide awarding organisations with a robust and flexible approach to deliver assessment for Sales NVQs / SVQs and competence-based qualifications.

EXTERNAL QUALITY CONTROL

- 2.1 Awarding organisations will provide qualifications and quality assurance that support their delivery to all Sales NVQs / SVQs and competence-based qualification assessment centres in line with regulatory requirements in England, Scotland, Wales and Northern Ireland.
- 2.2 Awarding organisations/bodies will carry out standard risk assessments in each Sales NVQ / SVQ and competence based qualification assessment centre and manage all identified risks appropriately
- 2.3 Awarding organisations/bodies will consistently apply external verification processes at all Sales NVQ / SVQ and competence based qualification assessment centres, underpinned by standard risk assessment and risk management processes.
- 2.4 Awarding organisations/bodies will supply SkillsCFA with reports: Quarterly: provide registration and achievement data at qualification levels and unit level where possible.

ASSESSING PERFORMANCE

- 3.1 Assessment of all units at any level of Sales NVQs / SVQs and competence-based qualifications may be based on either candidate performance at work or through simulation, as necessary (See Section 4 below).
- 3.2 Units which have been imported by the CFA in their Sales NVQs / SVQs and competence based qualifications will be assessed in compliance with their relevant assessment strategies.

SIMULATION OF NVQ / SVQ UNITS

- 4.1 If a unit or part of a unit at any level is simulated, it must be undertaken in a 'realistic working environment' (RWE).
- 4.2 Awarding organisations will provide guidance for centres on RWEs. Awarding organisations will make sure RWEs, "provide an environment which replicates the key characteristics of the workplace in which the skill to be assessed is normally employed".

OCCUPATIONAL EXPERTISE TO ASSESS PERFORMANCE, AND MODERATE AND VERIFY ASSESSMENTS

5.1 CANDIDATES MUST BE ASSESSED, MODERATED OR VERIFIED AT WORK EITHER BY:

A. ASSESSORS, MODERATORS OR VERIFIERS WHO HAVE ACHIEVED OR ARE WORKING TOWARDS ACHIEVEMENT OF THE APPROPRIATE REGULATORY BODY APPROVED UNIT QUALIFICATIONS FOR ASSESSMENT, MODERATION OR VERIFICATION;

OR

B. A TRAINER, SUPERVISOR OR MANAGER, EMPLOYED BY AN ORGANISATION, WHO MUST EITHER:

- Have achieved or be in the process of achieving the appropriate regulatory body approved unit qualifications for assessment, moderation or verification; or,
- Seek guidance and approval from an awarding organisation to demonstrate that the;
- Organisation has appropriate processes in place to facilitate assessment, moderation or verification functions
- Trainer, supervisor or manager is able to map their assessment, moderation or verification skills and knowledge 100% to the NOS upon which the qualifications above are based, and the A and V units. This is known as the employer direct model in Scotland.

5.2 Assessors must be occupationally competent to make Sales assessment judgements about the level and scope of individual candidate performance at work or in RWEs; and, occupationally competent to make assessment judgements about the quality of assessment and the assessment process.

5.3 External Moderators / Verifiers or Internal Moderators / Verifiers must be occupationally competent to make Sales moderation and verification judgements about the quality of assessment and the assessment process.

5.4 Awarding organisations will supply information on the requirements for internal and external moderation / verification activities to Sales assessment centres.

5.5 The sector requires all assessors, moderators and verifiers to maintain current Sales competence to deliver these functions. The CFA recognises this can be achieved in many ways but must be recorded in individual continual professional development (CPD) records that are maintained in Sales assessment centres.

E-SKILLS ASSESSMENT STRATEGY

E-SKILLS - THE SECTOR SKILLS COUNCIL FOR BUSINESS AND INFORMATION TECHNOLOGY ITQ ASSESSMENT STRATEGY ENGLAND AND WALES

This section sets out the ITQ assessment strategy appropriate for England and Wales. Arrangements for Scotland are published separately

ITQ ASSESSMENT

STRATEGY

INTRODUCTION

BACKGROUND TO THE NEW ITQ FRAMEWORK

The 2008 development of the National Occupational Standards (NOS) for Using IT and this associated assessment strategy are a key tool in the planned delivery of the Sector Skills Agreement for IT (SSA).

The SSA is uniting employers, educators, government and others to create a coherent strategy for IT skills based on a common, employer-led plan of action, that will transform the IT skills landscape such that:

- All organisations in every sector will be fully realising the potential of IT to help drive their business goals, so that the UK is a world leader in its exploitation of IT for innovation, service and business competitiveness.
- All individuals in the UK will have - and will continue to develop - the IT user skills necessary to fully participate in the e-economy.
- IT user skills will enhance individuals' employability, social lives and ability to benefit from online services.

World class research cited in the Qualifying for the Information Age – the e-skills UK Sector Qualification and Learning Strategy⁶ (SQLS) identifies, that workers in virtually all occupations need to be able to use more sophisticated IT systems more effectively to create new sources of customer value. Users will not only need increased levels of skills in basic desk top technology; they will also increasingly need to be skilled in security management and IT support processes and tools, and also the use of communications and mobile technologies.

The SSA for IT sets out a clear target for stakeholders delivering and beneficiaries receiving better IT user skills:

A simplified, flexible framework for recognising achievement in IT skills operates across the UK, throughout both the education system and industry.

The SQLS, together with the associated Action Plan, designed to deliver on the SSA, identifies the following principle⁷ for delivering on this target:

Principle 4: The ITQ Framework will be used to organise and position learning and qualifications within the coherent environment. All IT user qualifications and learning will be recorded through a recognised Record of Achievement

This means that:

- 1 AVAILABLE FOR DOWNLOAD AT: WWW.E-SKILLS.COM/SQLS
- 2 SEE SQLS (E-SKILLS UK, 4TH

APRIL 2008) CREDIT FRAMEWORKS

E-skills UK will derive units from the NOS in collaboration with Awarding Bodies to meet employers and learners needs and contribute to the ITQ.

Embedded Functional Skills [FS] within 14-19 curricula and qualifications

The revised IT User NOS embed the Functional Skills ICT [FS ICT] within the following three areas of competence that relate directly to FS ICT:

- IT USER FUNDAMENTALS [IUF:FS]
- IT COMMUNICATION FUNDAMENTALS [ICF:FS]
- IT SOFTWARE FUNDAMENTALS [ISF:FS]

BASIC SKILLS

The revised IT User NOS embed ICT Skills for Life and signpost opportunities for naturally occurring numeracy and literacy, within the three areas of competence with embedded

FS. Personal learning and thinking skills

The revised IT User NOS signpost opportunities for naturally occurring personal, learning and thinking skills [PLTS] within the three areas of competence with embedded Functional Skills [FS] and within the mandatory area of competence 'Improving productivity in using IT'.

'Full' level 2 qualification design principles

Eight trials with centres and learners commenced in 2007 for ICT Functional Skills in England. ICT Functional Skills standards have been defined from Entry 1 to Level 2. The ICT Functional Skills standards are comparable to the ICT Essential Skills standards in Northern Ireland and to the ICT Skills for Life standards in England.

The revised ITQ has been designed to take account of the proposed credit value of more than 13 credits for a full level 2 qualification.

Foundation Learning Tier

The revised ITQ framework has also been designed to take account of the proposed progression pathways for the Foundation Learning Tier, through allowing for the inclusion of FS Mathematics and English, and also for personal, learning and thinking skills [PLTS].

PRINCIPLES OF ITQ SUITE OF QUALIFICATIONS

Three principles underpin the proposed ITQ suite of qualifications.

- 1 FLEXIBILITY OF APPROACH IN RESPONSE TO SECTOR, EMPLOYER AND LEARNER NEEDS:
 - for sectors – to tailor and contextualise IT training both to reflect the increasing diversity of job roles and the use of specific systems and software
 - for employers – to ensure skills application and development enables practical exploitation of the potential of IT for business improvement
 - for learners – to ensure they are equipped with the appropriate skills to support their personal or career development
- 2 FLEXIBILITY OF CONTENT – TO STIMULATE AND INSPIRE NEW LEARNING AND SUPPORT PROGRESSION, THE ITQ OFFERS A RANGE OF SOLUTIONS VARYING IN:
 - size – from taster courses and bite-sized units to full-time programmes of study level of complexity – from Entry Level to Level 3
 - content – incorporating a range of options for different IT systems and applications
- 3 FLEXIBILITY OF ASSESSMENT METHOD AS APPROPRIATE TO THE INDIVIDUAL AND THE UNIT, WHICH MINIMISES THE ASSESSMENT BURDEN FOR LEARNERS. THE ITQ CAN THEREFORE ACCOMMODATE BOTH:
 - electronic testing using simulation, tests and tasks
 - portfolio-based evidence demonstrating the application of skills, knowledge and understanding

Currently four progression pathways have been defined for FLT in England.

This assessment strategy is being developed in consultation with employers, training providers, awarding bodies and the regulatory authorities.

2.1 SCOPE OF THE ASSESSMENT STRATEGY

This assessment strategy applies to all units and qualifications that are aligned to the IT User NOS and accredited onto credit frameworks to be included in the final ITQ Framework (both directly and partly aligned). During the transition period, the assessment arrangements for existing 'contributing' units and NQF qualifications will apply.

2.2 CHOICE OF ASSESSMENT METHOD

All ITQ units may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met. Assessments must also take into account the additional information provided in the unit Purpose and Aims relating to the level of demand of the activity, task, problem or question and the context in which it is set; the information input and output type and structure involved; and the IT tools, techniques or functions to be used.

Examples of recommended assessment methods are included in Annex A:

2.3 MANDATORY UNIT ASSESSMENT

In order to reflect the standards of competence expected by employers, assessment of the mandatory unit (Improving Productivity using IT) within Certificates and Diplomas must demonstrate that candidates can apply their relevant skills and knowledge to develop a specified outcome, product or solution. The candidate must independently determine, select and apply the necessary IT tools and techniques to achieve their goal.

The assessment design must cover the following aspects:

- Objectives for using IT – understanding the context in which IT is to be used or the conditions that may affect the way IT is to be used; understanding what outcome needs to be developed, and the expectations and requirements that the outcome must meet;
- Application of IT skills and knowledge – understanding what is involved in a piece of work and the best way to get it done;
- Evaluation of the use of IT – being able to evaluate the strengths and weaknesses of the use of IT, including identifying improvements to inform future work.

2.4 ACCREDITATION OF PRIOR ACHIEVEMENT (APA)

For candidates starting their studies towards the ITQ the process for accreditation of prior achievement is straightforward. Awarding bodies agree to mutual recognition of achievement, so that candidates will be able to count any relevant units towards the ITQ regardless of which awarding body issues the certificates.

Many people may have developed their skills in using IT through undertaking existing or 'legacy' accredited units, qualifications or from non-accredited units and employer training schemes, such as:

- the current ITQ, which is technically a Scottish or National Vocational Qualification [S/NVQ]
- Functional Skills ICT, ICT Skills for Life [Basic Skills] and in Essential Skills ICT (Northern Ireland);
- legacy units from VQs or VRQs accredited on the National Qualifications Framework (NQF) or accredited by the Scottish Qualifications Authority (SQA); vendor units and qualifications; and employer training schemes

The ITQ Framework lists which units or schemes can contribute to the ITQ, and whether there are any limits on counting credit from such achievement. The up-to-date ITQ Framework will be published on the e-skills UK website.

Acceptance of contributing qualifications is mandatory for all ITQ Awarding Bodies irrespective of the originating Awarding Body (AB). An Awarding Body offering ITQs must accept recognised units and qualifications from any other AB if the following conditions are met:

- the candidate presents the original qualification, unit certificate or other agreed record of achievement for inspection by the ITQ centre; and the unit was achieved no more than three years prior to the date of presentation to the centre. It is the responsibility of the AB and their centres to ensure that a representative sample of certificated skills and knowledge are still current.

Some approved contributing units entitle candidates to claim exemptions for more than one ITQ unit. In such cases, the candidate does not have to claim exemptions for all of the possible ITQ units unless he/she chooses to do so.

2.5 PROGRESSION

Candidates may carry forward credits for a period of 3 years to support progression from ITQ Award to ITQ Certificate and from ITQ Certificate to ITQ Diploma or from Level 1 to 2, or Level 2 to 3.

Candidates may not include the same unit at more than 1 level in any qualification. Thus a candidate who has completed, for example, both Word Processing at Level 1 (3 credits) and Word Processing at Level 2 (4 credits) may only count credits from the higher level towards the qualification.

2.6 ASSESSMENT ROLES AND QUALITY ASSURANCE

2.6.1 ASSESSORS, INTERNAL AND EXTERNAL MODERATORS/VERIFIERS

The new ITQs are not NVQs; therefore, there is no need for assessors to hold the A1 qualification, or for verifiers to hold the V1 qualification, or indeed to be working towards these qualifications.

To ensure the quality of assessment decisions, it is expected that awarding bodies will have in place methods to ensure that assessors, internal and external moderators/verifiers have:

- the necessary IT skills and experience to assess the units and qualifications they are making judgements on, such as demonstrated by holding an ITQ at level 3. Centres must maintain a current register of curriculum vitae (CVs), including reference to continuing professional development. E-skills UK do not require assessors, internal or external moderators/verifiers to hold assessor qualifications beyond those required by the awarding or regulatory body.

2.6.2 STANDARDISATION, MODERATION AND VERIFICATION

Awarding Bodies must use quality assurance systems that are fit for purpose for the assessment method(s) being used and are in line with the relevant regulatory requirements.

For example:

- internal/external moderation of externally set examinations or online tests
- external moderation of externally set and internally marked tasks
- records to authenticate candidate's evidence for assessment
- internal standardisation/ external moderation of scenario based assignments set by centres
- internal moderation/verification of internally assessed evidence by a suitably qualified internal moderator/verifier using procedures approved by the awarding body
- external moderation/verification of internally assessed evidence by a suitably qualified external moderator/verifier using procedures specified by the awarding body

2.7 JOINT AWARDING BODY FORUM

Awarding Bodies, through the quality control mechanisms specified by the regulatory authorities, must ensure a rigorous and effective control of centres and the assessment and verification process so that judgement of what is valid, authentic, current, reliable and sufficient evidence is maintained across all assessment contexts.

To ensure consistency of assessment it is required that all Awarding Bodies routinely participate in the e-skills UK Joint Awarding Body Forum which will be the focus for ensuring that assessment and verification of competence is carried out consistently and fairly across all assessment contexts.

The Awarding Body Forum will, within the individual Awarding Bodies agreed methodologies, develop and maintain a common understanding of the standards and promote good assessment and verification practice.

ANNEX A

GUIDANCE FOR AWARDING BODIES ON RECOMMENDED ASSESSMENT METHODS

The following methods are recommended for the assessment of IT User skills, knowledge and understanding for all ITQ units.

- e-assessment
- knowledge tests
- scenario-based assessment
- portfolio of evidence taken from activities involving the use of contemporary ICT systems
- witness testimony
- professional discussion
- other methods which have been approved by e-skills UK and the Awarding Body

Whatever method is used, Awarding bodies must have appropriate systems and procedures to:

- ensure that assessment arrangements meet relevant assessment design principles and quality assurance regulations; and make sample assessment materials available for discussion by the Joint Awarding Body Forum, as required

A.1 E-ASSESSMENT

Online or e-assessment may be used to assess some learning outcomes and assessment criteria relating to performance, knowledge and understanding, for example, of the performance skills in formatting text or understanding of the reasons for choosing different software tools. Awarding Bodies, employers or providers may develop e-assessments. Where e-assessment is used, Awarding Bodies must ensure that on each assessment occasion:

- the performance, knowledge and understanding being assessed matches that specified in the relevant ITQ unit.
- the level is sufficiently challenging.
- the assessment methodology used is robust and reliable.

Where employers or provider develop e-assessments, these should be agreed in advance with the Awarding Body.

A.2 KNOWLEDGE TESTS

Knowledge tests, often delivered electronically, can be used to assess some learning outcomes and assessment criteria relating to knowledge and understanding, for example, knowledge of security risks or organisational guidelines.

Awarding Bodies, employers or providers may develop knowledge tests. Where knowledge tests are used, Awarding Bodies must ensure that on each testing occasion:

- the knowledge being tested matches that specified in the relevant ITQ unit.
- the level is sufficiently challenging.
- the assessment methodology used is robust and reliable.

Where employers or providers develop knowledge tests, these should be agreed in advance with the awarding body.

1. A.3 SCENARIO BASED ASSESSMENT

'Scenarios' may be developed to provide a purpose for using IT, which requires the candidate to undertake practical tasks or activities that produce assessable outcomes. Scenarios may be combined with other methods of assessment, for example to provide a purpose for a series of online assessment tasks.

Awarding Bodies, employers or providers may develop scenarios. The scenario and associated tasks must be carefully designed to ensure that:

- the performance, knowledge and understanding being assessed matches that specified in the relevant ITQ unit.
- the level is sufficiently challenging.
- the demands and constraints result in the purposeful use of IT, and where relevant reflect those that would typically be met in a real work context.

2. A.4 PORTFOLIO ASSESSMENT

Valid evidence can arise from:

- activities undertaken for or at work;
- the search for employment (e.g. CVs, job applications and emails to potential employers);
- social activities (e.g. club membership databases, posters and websites), such as:
 - enterprise activities (e.g. business plans, budgets and marketing materials)
 - voluntary activities (e.g. cash flows, programmes and newsletters)
 - learning and studying subjects other than IT (e.g. internet research for a geography assignment, reports/dissertations and presentations). By the very nature of IT, activities can be carried out in a variety of locations not confined to the traditional office setting.

Portfolio evidence should arise naturally from tasks and activities involving the use of IT and may include:

- product outcomes – in the form of outputs or screenshots produced using IT – which should form the majority of evidence; and
- ephemeral evidence – where this is the only evidence for an element (for example, of planning), should be cross checked by professional discussion and backed up by brief written evidence – for example in the form of annotations, storyboards or 'witness statement' (see below).

e-skills UK actively encourages the use of electronic portfolio management tools.

A.5 WITNESS STATEMENTS

A 'witness' is someone who provides a written statement about the quality and authenticity of a candidate's work for assessment purposes. To make a statement the witness must have first-hand experience of the candidate's performance and understanding of knowledge, skills and understanding required to do the work. Witnesses can be drawn from a wide range of people who can attest to performance, including line managers and experienced colleagues from inside the candidate's organisation.

A witness statement may be needed when the candidate is performing day-to-day activities, which leave little or no evidence behind, for example, agreeing the outcomes to be produced using IT and any deadlines that need to be met or understanding and meeting organisational guidelines for data security and file storage. The witness can, in particular, provide evidence relating to the candidate's competence:

- when reviewing, testing and recommending ways of improving productivity using IT towards [IPU] the mandatory unit for ITQ Certificates and Diplomas.
- when using specialist or bespoke IT software applications.
- in meeting customer requirements.
- of working within organisational guidelines.

ABBREVIATIONS USED IN THIS SECTION

AB Awarding Body

AoC Area of Competence

APA Accreditation of Prior Achievement APL

Accreditation of Prior Learning

CCEA Council for the Curriculum, Examinations and Assessment (Northern Ireland)

CQFW Credit and Qualification Framework for Wales

DCELLS Department for Children, Education, Lifelong Learning and Skills (Wales) FLT

Foundation Learning Tier

FS Functional Skills

FS ICT Functional Skills ICT

IPU Improving Productivity using IT

NICATS Northern Ireland Credit Accumulation and Transfer System

NOS National Occupational Standards

NQF National Qualifications Framework

NVQ National Vocational Qualification

PLTS Personal Learning and Thinking Skills

QCA Qualifications and Curriculum Authority

RQF Regulated Qualifications Framework

SCQF Scottish Credit and Qualification Framework

SQA Scottish Qualifications Authority

SQLS Sector Qualifications and Learning

Strategy SSA Sector Skills Agreement

SVQ Scottish Vocational Qualification ULN Unique Learner Number

VQ Vocational Qualification

VRQ Vocationally Related Qualification

QUALIFICATION STRUCTURE

To achieve a Level 2 Diploma in Business Administration, learners must complete a **minimum of 45 credits**:

- 1 21 credits from GROUP A MANDATORY UNITS.
- 2 A **minimum of 14 credits** from **GROUP B OPTIONAL UNITS**.
- 3 A maximum of 10 credits from GROUP C OPTIONAL UNITS.
- 4 A **maximum of 6 credits** from **GROUP D OPTIONAL UNITS**.

A **minimum of 36 credits** must be achieved through the completion of units at Level 2 or above.

The total Guided Learning Hours (GLH) for this qualification is 229 hours.

The Total Qualification Time (TQT) for this qualification is 450 hours.

UNIT STRUCTURES

Mandatory units are listed below. For detailed information on Optional units, please see the additional Optional units document. You will need to log in to see this. If you require any assistance, please email contactus@innovateawarding.org.

MANDATORY UNITS

Unit ref	Unit title	Level	Credit value	GLH
H/506/1893	Communication in a business environment	2	3	19
J/506/1899	Principles of providing administrative services	2	4	25
T/506/1901	Principles of business document production and information management	2	3	21
A/506/1964	Understand employer organisations	2	4	40
L/506/1788	Manage personal performance and development	2	4	18
R/506/1789	Develop working relationships with colleagues	2	3	19

OPTIONAL UNITS (GROUP B)

Unit ref	Unit title	Level	Credit value	GLH
L/506/1807	Manage diary systems	2	2	12
Y/506/1809	Produce business documents	2	3	24
L/506/1810	Collate and report data	2	3	19
R/506/1811	Store and retrieve information	2	4	19
Y/506/1812	Produce minutes of meetings	2	3	13
D/506/1813	Handle mail	2	3	15
H/506/1814	Provide reception services	2	3	15
K/506/1815	Prepare text from notes using touch typing	2	4	26
M/506/1816	Prepare text from shorthand	2	6	46
T/506/1817	Prepare text from recorded audio instruction	2	4	15
T/506/1865	Archive information	2	3	14
Y/506/2295	Maintain and issue stationery and supplies	2	3	18
J/506/1868	Use and maintain office equipment	2	2	10
L/506/1869	Contribute to the organisation of an event	2	3	23
D/506/1875	Organise business travel or accommodation	2	4	23
H/506/1876	Provide administrative support for meetings	2	4	28
T/506/1879	Administer human resource records	2	3	28
A/506/1883	Administer the recruitment and selection process	2	3	25
R/506/1887	Administer parking dispensations	2	3	25

R/506/1890	Administer finance	2	4	21
M/506/1895	Buddy a colleague to develop their skills	2	3	19
L/506/1905	Employee rights and responsibilities	2	2	16
D/506/1794	Health and safety in a business environment	1	2	10
K/506/1796	Use a telephone and voicemail system	1	2	20
A/506/1799	Meet and welcome visitors in a business environment	1	2	20
K/506/1913	Develop a presentation	3	3	11
M/506/1914	Deliver a presentation	3	3	17
A/506/1916	Contribute to the development and implementation of an information system	3	6	21
F/506/1917	Monitor information systems	3	8	43
M/506/1945	Analyse and present business data	3	6	24

OPTIONAL UNITS (GROUP C)

Unit ref	Unit title	Level	Credit value	GLH
M/502/4300	Using email	2	3	20
R/502/4628	Word Processing Software	2	4	30
R/502/4631	Website Software	2	4	30
F/502/4625	Spreadsheet Software	2	4	30
M/502/4622	Presentation Software	2	4	30
F/502/4396	Bespoke Software	2	3	20
J/502/4559	Data Management Software	2	3	20
A/506/2130	Deliver customer service	2	5	27
R/506/2134	Process information about customers	2	3	14
Y/506/2149	Develop customer relationships	2	3	18
F/506/1934	Participate in a project	3	3	19
F/601/8320	Processing customers' financial transactions	2	4	8
T/505/1238	Payroll Processing	2	5	20

OPTIONAL UNITS (GROUP D)

Unit ref.	Title	Level	Credit value	GLH
A/506/1818	Understand the use of research in business	2	6	40
D/506/1939	Understand the legal context of business	3	6	44
K/503/8194	Principles of customer relationships	2	3	18
R/506/2294	Principles of team leading	2	5	37
J/506/1806	Principles of equality and diversity in the workplace	2	2	10
D/502/9928	Principles of marketing theory	2	4	30
D/502/9931	Principles of digital marketing	2	5	40
L/506/2083	Understand working in a customer service environment	1	3	25
R/505/3515	Know how to publish, integrate and share using social media	2	5	40
F/505/6880	Exploring Social Media	2	2	16
L/505/3514	Understand the safe use of online and social media platforms	2	4	35

Title:	H/506/1893 Communication in a Business Environment
Level:	2
Credit value:	3
GLH:	19
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the requirements of written and verbal business communication	1.1 Explain why different communication methods are used in the business environment 1.2 Describe the communication requirements of different audiences 1.3 Explain the importance of using correct grammar, sentence structure, punctuation, spelling and conventions in business communications 1.4 Explain the importance of using appropriate body language and tone of voice when communicating verbally
2. Be able to produce written business communications	2.1 Identify the nature, purpose, audience and use of the information to be communicated 2.2 Use communication channels that are appropriate to the information to be communicated and the audience 2.3 Present information in the format that meets the brief 2.4 Adhere to agreed business communication conventions and degree of formality of expression when producing documents 2.5 Produce business communications that are clear, accurate and correct 2.6 Meet agreed deadlines in communicating with others

<p>3. Be able to communicate verbally in business environments</p>	<p>3.1 Identify the nature, purpose, recipient/s and intended use of the information to be communicated</p> <p>3.2 Use language that is appropriate for the recipient's needs</p> <p>3.3 Use body language and tone of voice to reinforce messages</p> <p>3.4 Identify the meaning and implications of information that is communicated verbally</p> <p>3.5 Confirm that a recipient has understood correctly what has been communicated</p> <p>3.6 Respond in a way that is appropriate to the situation and in accordance with organisational policies and standards</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to develop the knowledge and skills required to communicate in a business environment. Upon completion of this unit, learners will be able to produce written business communications and will be able to communicate verbally in business environments.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAA613 Understand how to communicate in a business environment • CFABAA614 Prepare to communicate in a business environment • CFABAA615 Communicate in a business environment

Title:	J/506/1899 Principles of providing administrative services
Level:	2
Credit value:	4
GLH:	25
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the organisation and administration of meetings	1.1 Describe the features of different types of meetings 1.2 Outline the different ways of providing administrative support for meetings 1.3 Explain the steps involved in organising meetings
2. Understand the organisation of travel and accommodation	2.1 Describe the features of different types of business travel and accommodation 2.2 Explain the purpose of confirming instructions and requirements for business travel and accommodation 2.3 Explain the purpose of keeping records of business travel and accommodation
3. Understand how to manage diary systems	3.1 Describe the features of hard copy and electronic diary systems 3.2 Explain the purpose of using diary systems to plan and co-ordinate activities and resources 3.3 Describe the types of information needed to manage a diary system 3.4 Explain the importance of obtaining correct information when making diary entries

4. Understand how to use office equipment	4.1 Describe different types of office equipment 4.2 Explain the uses of different types of office equipment 4.3 Describe factors to be considered when selecting office equipment to complete tasks 4.4 Describe how to keep waste to a minimum when using office equipment
5. Understand the use of mail services in a business context	5.1 Describe the types of mail services used in business organisations 5.2 Explain the need for different types of mail services 5.3 Explain the factors to be considered when selecting mail services 5.4 Explain the factors to be taken into account when choosing postage methods
6. Understand customer service in a business environment	6.1 Describe different types of customers 6.2 Describe the impact of their own behaviour on a customer 6.3 Explain the impact of poor customer service
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop knowledge and understanding regarding the provision of providing administrative services. Upon completion of this unit, learners will have developed an understanding of the organisation and administration of meetings, the organisation of travel and accommodation, and the management of diary systems. Learners will also understand how to use office equipment and will understand the use of mail services in a business context.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards

Title:	T/506/1901 Principles of business document production and information management
Level:	2
Credit value:	3
GLH:	21
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to prepare business documents	1.1 Describe different types of business documents that may be produced and the format to be followed for each 1.2 Explain the use of different types of information communication technology (ICT) for document production 1.3 Explain the reasons for agreeing the use, content, layout, quality standards and deadlines for document production 1.4 Explain the importance of document version control and authorisation 1.5 Explain how the requirements of security, data protection, copyright and intellectual property legislation may affect the production of business documents 1.6 Explain how to check the accuracy of business documents
2 Understand the distribution of business documents	2.1 Explain how the requirements of security, data protection, copyright and intellectual property legislation may affect the distribution and storage of business documents 2.2 Describe different types of distribution channels

<p>3 Understand how information is managed in business organisations</p>	<p>3.1 Describe the types of information found in business organisations</p> <p>3.2 Explain the need for safe storage and efficient retrieval of information</p> <p>3.3 Describe the features of different types of systems used for storage and retrieval of information</p> <p>3.4 Describe the legal requirements for storing business information</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to develop knowledge and understanding regarding the principles of business document production and information management. Upon completion of this unit, learners will understand how to prepare and distribute business documents and will also understand how information is managed in business organisations.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>N/A</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Business & Administration (2013) National Occupational Standards</p>

Title:	A/506/1964 Understand employer organisations
Level:	2
Credit value:	4
GLH:	40
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand organisational structures	1.1 Explain the differences between the private sector, public sector and voluntary sector 1.2 Explain the functions of different organisational structures 1.3 Describe the features of different types of legal structures for organisations
2. Understand the organisational environment	2.1 Describe the internal and external influences on organisations 2.2 Explain the use of different models of analysis in understanding the organisational environment 2.3 Explain why change in the business environment is important
Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop knowledge and understanding regarding employer organisations. Upon completion of this unit, learners will have developed an understanding of organisational structures and the organisational environment.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	L/506/1788 Manage personal performance and development
Level:	2
Credit value:	4
GLH:	18
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Be able to manage personal performance	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
2. Be able to manage their own time and workload	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"
3. Be able to identify their own development needs	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)

	<p>3.5 Identify their own development needs from analyses of the role, personal and team objectives</p> <p>3.6 Use feedback from others to identify their own development needs</p> <p>3.7 Agree specific, measurable, achievable, realistic and time-bound (SMART) development objectives that align with organisational and personal needs</p>
4. Be able to fulfil a personal development plan	<p>4.1 Agree a personal development plan that specifies actions, methods, resources, timescales and review mechanisms</p> <p>4.2 Make use of formal development opportunities that are consistent with business needs</p> <p>4.3 Use informal learning opportunities that contribute to the achievement of personal development objectives</p> <p>4.4 Review progress against agreed objectives and amend plans accordingly</p> <p>4.5 Share lessons learned with others using agreed communication methods</p>
Additional information about this unit	
N/A	
Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	R/506/1789 Develop working relationships with colleagues
Level:	2
Credit value:	3
GLH:	19
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the principles of effective team working	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
2. Be able to maintain effective working relationships with colleagues	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
3. Be able to collaborate with colleagues to resolve problems	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

Additional information about this unit	
N/A	
Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Details of the relationship of the unit and relevant national occupational standards	N/A

OPTIONAL UNITS

Title:	L/506/1807 Manage diary systems
Level:	2
Credit value:	2
GLH:	12
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the management of diary systems	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
2. Be able to manage diary systems	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
Additional information about this unit	
N/A	
Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards:

	CFABAA431: Use a diary system
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Title:	Y/506/1809 Produce business documents
Level:	2
Credit value:	3
GLH:	24
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to prepare business documents	1.1 Explain the requirements for language, tone, image and 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 data protection, copyright and intellectual property legislation relating to document production 1.5 Describe organisational procedures for version control 1.6 Describe security requirements relating to document production
2. Be able to prepare business documents	2.1 Identify the purpose, audience, content, style, format and deadlines of a document 2.2 Use document production resources in line with organisational guidelines 2.3 Use correct grammar, spelling, punctuation and sentence structure 2.4 Produce documents that meet the requirements within the agreed timescale
3. Be able to distribute business documents	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 production, distribution and storage of documents

Additional information about this unit	
N/A	
Unit aim (s)	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
Assessment requirements specified by a sector or regulatory body (if appropriate)	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAA211: Produce documents in a business environment
Details of the relationship of the unit and relevant national occupational standards	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	L/506/1810 Collate and report data
Level:	2
Credit value:	3
GLH:	19
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to collate and report data	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 confidentiality, data protection, intellectual property and copyright legislations
2. Be able to collate data	2.1 Ensure that data collected is complete, accurate and 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
3. Be able to report data	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
Additional information about this unit	
N/A	
Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)

Details of the relationship of the unit and relevant national occupational standards

Business & Administration (2013) National Occupational Standards:

- CFABAD321: Collate and organise data

Title:	R/506/1811 Store and retrieve information
Level:	2
Credit value:	4
GLH:	19
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand information storage and retrieval	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
2. Be able to gather and store information	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
3. Be able to retrieve information	3.1 Confirm information to be retrieved and its intended use 3.2 Retrieve the required information within the agreed timescale
Additional information about this unit	
N/A	

Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAD332: Store and retrieve information using a filing system

Title:	Y/506/1812 Produce minutes of meetings
Level:	2
Credit value:	3
GLH:	13
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to take minutes of meetings	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
2. Be able to take notes of meetings	2.1 Take accurate notes of the attendance, proceedings, areas of discussion and agreed actions of meetings 2.2 Record allocated responsibilities for agreed actions
3. Be able to produce minutes of meetings	3.1 Transcribe notes accurately into meeting minutes using correct language, grammar, punctuation and 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
Additional information about this unit	
N/A	

Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAA441 Take minutes

Title:	D/506/1813 Handle mail
Level:	2
Credit value:	3
GLH:	15
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to deal with mail	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 mail handling, security and the use of courier services 1.6 Explain the process for reporting suspicious or damaged items in accordance with organisational procedures
2. Be able to deal with incoming mail	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
3. Be able to deal with outgoing mail	3.1 Organise the collection of outgoing mail and packages on time 3.2 Identify the best option for dispatching mail according to the required degree of urgency, size and value of the item 3.3 Dispatch outgoing mail on time
Additional information about this unit	
N/A	

Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAA612 Handle mail
Details of the relationship of the unit and relevant national occupational standards	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	H/506/1814 Provide reception services
Level:	2
Credit value:	3
GLH:	15
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand reception services	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 health, safety and security implications of visitors to a building 1.5 Explain how to deal with challenging people
2. Be able to provide a reception service	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 entry, security, health and safety
Additional information about this unit	
N/A	

Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAC312 Provide reception services

Title:	K/506/1815 Prepare text from notes using touch typing
Level:	2
Credit value:	4
GLH:	26
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to create text from notes	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 incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content 1.4 Explain how technology features can help to create, format and check the accuracy of text 1.5 Describe ways of checking produced texts for accuracy and correctness 1.6 Describe organisational procedures for the storage, security and confidentiality of information
2. Be able to produce text using touch typing	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
Additional information about this unit	
N/A	

Unit aim (s)	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
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAA213a-c: Prepare text from notes using touch typing

Title:	M/506/1816 Prepare text from shorthand
Level:	2
Credit value:	6
GLH:	46
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to use shorthand to create text	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 incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content 1.4 Explain how technology features can help to create, format and check the accuracy of text 1.5 Describe ways of checking produced texts for accuracy and correctness 1.6 Describe organisational procedures for the storage, security and confidentiality of information
2. Be able to use shorthand to prepare text	2.1 Agree the purpose, format and 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
Additional information about this unit	
N/A	

Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAD311: Prepare text from shorthand

Title:	T/506/1817 Prepare text from recorded audio instruction
Level:	2
Credit value:	4
GLH:	15
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the preparation of text from recorded notes	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 incorrect spelling, punctuation, grammar and sentence structure, and inaccurate content 1.5 Describe ways of checking produced texts for accuracy and correctness 1.6 Describe organisational procedures for the storage, security and confidentiality of information
2. Be able to prepare text from recorded notes	2.1 Agree the purpose, format and 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
Additional information about this unit	
N/A	

Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAD312: Prepare text from recorded audio instruction

Title:	T/506/1865 Archive information
Level:	2
Credit value:	3
GLH:	14
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand archiving requirements	1.1 Describe different ways of archiving information 1.2 Describe how to retrieve archived information 1.3 Describe organisational procedures for archiving, retrieving and deleting information 1.4 Explain the importance of document retention policies to organisations 1.5 Describe the security and access requirements of offsite archives
2. Be able to archive information	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 policies and procedures, legal and ethical requirements when archiving information
Additional information about this unit	
N/A	
Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)

Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none">• CFABAD334 Provide archive services
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Title:	Y/506/2295 Maintain and issue stationery and supplies
Level:	2
Credit value:	3
GLH:	18
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the maintenance of stationery and supplies	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
2. Be able to maintain stocks of stationery and supplies	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
3. Be able to issue stock of stationery and supplies	3.1 Issue stationery and supplies in accordance with organisational requirements 3.2 Maintain up-to-date records of stock issued, received and in storage

	<p>3.3 Deal with unwanted or damaged stationery and supplies safely</p> <p>3.4 Recommend ways in which the system for receiving and issuing stock could be improved</p>
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to maintain and issue stationery and supplies. Upon completion of this unit, learners will be able to maintain and issues stocks of stationery and supplies.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAF141: Maintain and issue stock items

Title:	J/506/1868 Use and maintain office equipment
Level:	2
Credit value:	2
GLH:	10
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to use office equipment	1.1 Describe organisational policies, procedures and 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
2. Be able to use and maintain office equipment	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
Additional information about this unit	
N/A	
Unit aim (s)	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.

Assessment requirements specified by a sector or regulatory body (if appropriate)	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none">• CFABAA231: Use office equipment
Details of the relationship of the unit and relevant national occupational standards	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	L/506/1869 Contribute to the organisation of an event
Level:	2
Credit value:	3
GLH:	23
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand event organisation	1.1 Explain the roles, responsibilities and 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 health, safety and security when organising events 1.6 Describe the types of problems that may occur during events and how to deal with them
2. Be able to carry out pre-event actions	2.1 Identify venue requirements for an event 2.2 Obtain resources within the agreed timescales 2.3 Distribute pre-event documentation to delegates in accordance with the event plan 2.4 Co-ordinate attendee responses within the agreed timescale 2.5 Identify any special requirements of event attendees
3. Be able to set up an event	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

4. Be able to carry out post-event actions	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
Additional information about this unit N/A	
Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAA311 Support the organisation and co-ordination of events

Title:	D/506/1875 Organise business travel or accommodation
Level:	2
Credit value:	4
GLH:	23
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the organisation of business travel or accommodation for others	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
2. Be able to research business travel or accommodation options for others	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
3. Be able to make business travel or accommodation arrangements for others	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

	<p>3.5 Confirm the acceptability of payments to be made within the limits of their own authority</p> <p>3.6 Keep up-to-date records of travel or accommodation arrangements and agreed commitments</p> <p>3.7 Adhere to organisational policies and procedures, legal and ethical requirements when making business travel or accommodation arrangements for others</p>
Additional information about this unit N/A	
Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Business & Administration (2013) National Occupational Standards: CFABAA322 Organise business travel or accommodation
Details of the relationship of the unit and relevant national occupational standards	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	H/506/1876 Provide administrative support for meetings
Level:	2
Credit value:	4
GLH:	28
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the administration of meetings	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 access, health, safety and 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
2. Be able to make administrative preparations for meetings	2.1 Book meeting venue, resources, and facilities in accordance with the brief 2.2 Collate documents needed for a meeting 2.3 Distribute meeting invitations, documents and other meeting-related requirements within the timescale 2.4 Confirm meeting attendees and any special requirements
3. Be able to support the administration of meetings	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
Additional information about this unit N/A	
Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	<ul style="list-style-type: none"> • Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAA411 Support the organisation of meetings • CFABAA412 Plan and organise meetings

Title:	T/506/1879 Administer human resource records
Level:	2
Credit value:	3
GLH:	28
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the administration of human resource (HR) records	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 confidentiality, data protection and 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
2 Be able to administer HR information	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 organisational policies and procedures, legal and ethical requirements
Additional information about this unit	
N/A	

Unit aim (s)	This unit aims to develop the knowledge and skills required to administer human resource records. Upon completion of this unit, learners will be able to administer human resource (HR) information.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAB151 Administer HR records
Details of the relationship of the unit and relevant national occupational standards	Skills CFA Assessment Strategy Competence units (S/NVQ)

Title:	A/506/1883 Administer the recruitment and selection process
Level:	2
Credit value:	3
GLH:	25
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the recruitment and selection process	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 confidentiality, data protection and system security
2. Be able to administer the recruitment process	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 organisational policies and procedures, legal and ethical requirements

<p>3. Be able to administer the selection process</p>	<p>3.1 Invite shortlisted applicants to participate in the selection process in accordance with organisational procedures</p> <p>3.2 Co-ordinate selection arrangements in accordance with the brief</p> <p>3.3 Carry out agreed pre-employment checks within the agreed timescale</p> <p>3.4 Inform applicants of the outcome of their application in accordance with organisational policies and procedures</p> <p>3.5 Keep selection records up-to-date</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>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.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • BAB152 Administer the recruitment and selection process
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>

Title:	R/506/1887 Administer parking dispensations
Level:	2
Credit value:	3
GLH:	25
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the administration of parking dispensations	1.1 Explain the scope and limits of their own responsibilities and authority in issuing parking dispensations 1.2 Describe the legal and regulatory requirements relating to parking dispensations 1.3 Describe the parking dispensation eligibility criteria and checks 1.4 Describe organisational security and anti-fraud policies, procedures and processes 1.5 Describe the features of software to manage the issues of permits, season tickets, suspensions, dispensations or waivers and blue badges 1.6 Explain where to go for help when dealing with parking dispensations
2. Be able to process applications for parking dispensations	2.1 Advise customers of the eligibility criteria for parking dispensations 2.2 Determine whether customers are eligible by matching the case to the criteria 2.3 Clarify any areas of doubt or confusion with customers 2.4 Carry out relevant checks in accordance with organisational procedures and legislative procedures 2.5 Record the reasons for the decision as to whether or not to grant parking dispensations 2.6 Maintain the requirements of confidentiality and data protection

<p>3. Be able to issue parking dispensations</p>	<p>3.1 Communicate the decision and return related paperwork on parking dispensations to customers in accordance with organisational procedures</p> <p>3.2 Process payments and refunds in accordance with organisational procedures</p> <p>3.3 Keep records up-to-date</p> <p>3.4 Adhere to organisational policies and procedures, legal and ethical requirements</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit aims to develop the knowledge and skills required to administer parking dispensations. Upon completion of this unit, learners will be able to process applications for parking dispensations and issue parking dispensations.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> CFASPA1 Administer parking permits, suspensions and dispensations
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>

Title:	R/506/1890 Administer Finance
Level:	2
Credit value:	4
GLH:	21
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand finance for administrators	1.1 Describe organisational hierarchy and levels of authority for financial transactions 1.2 Explain organisational systems for sales invoicing, purchasing, payments and receipts 1.3 Describe the use of a purchase order, invoice, receipts and expenses
2. Be able to administer finance	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
Additional information about this unit	
N/A	
Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards

Title:	M/506/1895 Buddy a colleague to develop their skills
Level:	2
Credit value:	3
GLH:	19
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to buddy a colleague	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
2. Be able to plan to buddy a colleague	2.1 Agree which aspects of a colleague's work may benefit from buddying 2.2 Confirm organisational requirements for standards of behaviour, presentation, communication and performance of a buddy colleague 2.3 Agree a schedule of meetings that minimise disruption to business 2.4 Agree specific, measurable, achievable, realistic and time-bound (SMART) buddying objectives
3. Be able to support a buddy colleague carrying out work activities	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
Additional information about this unit	
N/A	

Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Customer Service (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFACSD5249 Buddy a colleague to develop their customer service skills

Title:	L/506/1905 Employee rights and responsibilities
Level:	2
Credit value:	2
GLH:	16
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the role of organisations and industries	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 industry, occupation, training and 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 types, roles and responsibilities of representative bodies and their relevance to their own role
2. Understand employers' expectations and employees' rights and obligations	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 personal presentation, punctuality and 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
Additional information about this unit	
N/A	

Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	D/506/1794 Health and safety in a business environment
Level:	1
Credit value:	2
GLH:	10
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand health and safety responsibilities in a business environment	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
2. Know how to work in a safe way in a business environment	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
3. Be able to comply with health and safety requirements in a business environment	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

Additional information about this unit	
N/A	
Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAE141 Use occupational and safety guidelines when using a workstation

Title:	K/506/1796 Use a telephone and voicemail system
Level:	1
Credit value:	2
GLH:	20
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Know how to use a telephone and voicemail system	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
2. Be able to make telephone calls	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

<p>3. Be able to receive telephone calls</p>	<p>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</p>
<p>4. Be able to use voicemail systems</p>	<p>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</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>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.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> • CFABAA621 Make and receive telephone calls • CFABAA622 Use voicemail message systems

Title:	A/506/1799 Meet and welcome visitors in a business environment
Level:	1
Credit value:	2
GLH:	20
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Know how to meet visitors in a business environment	1.1 State an organisation's procedures for dealing with visitors 1.2 Describe the standards of personal behaviour and presentation that an organisation should expect from staff that meet and welcome visitors 1.3 Identify any organisational health, safety and security requirements relevant to visitors 1.4 Describe what to do and who to contact when problems with visitors arise
2. Be able to meet visitors in a business environment	2.1 Welcome visitors politely in accordance with organisational standards 2.2 Confirm the identity of visitors and the reasons for their visit 2.3 Check that any health, safety and security actions are carried out 2.4 Record visitors' arrival and departure in accordance with organisational procedures 2.5 Inform those who are being visited of the arrival of their visitor(s) in accordance with organisational standards 2.6 Present a positive personal image in accordance with organisational standards
Additional information about this unit	
N/A	

Unit aim (s)	This unit aims to develop the knowledge and skills required to meet and welcome visitors in a business environment. Upon completion of this unit, learners will be able to meet visitors in a business environment
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAC311 Meet and welcome visitors

Title:	K/506/1913 Develop a presentation
Level:	3
Credit value:	3
GLH:	11
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to develop a presentation	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
2. Be able to develop a presentation	2.1 Identify the purpose, content, style, timing and audience for a presentation 2.2 Select a communication media that is appropriate to the nature of a presentation, message and audience 2.3 Tailor a presentation to fit the timescale and audience's needs 2.4 Prepare a presentation that is logically structured, summarises the content and 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
Additional information about this unit	
N/A	

Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAA617 Develop a presentation

Title:	M/506/1914 Deliver a presentation
Level:	3
Credit value:	3
GLH:	17
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the principles underpinning the delivery of presentations	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
2. Be able to prepare to deliver a presentation	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

<p>3. Be able to deliver a presentation</p>	<p>3.1 Speak clearly and confidently, using language that is appropriate for the topic and the audience</p> <p>3.2 Vary their voice tone, pace and volume appropriately when delivering a presentation</p> <p>3.3 Use body language in a way that reinforces messages</p> <p>3.4 Use equipment and resources effectively when delivering a presentation</p> <p>3.5 Deliver a presentation within the agreed timeframe</p> <p>3.6 Respond to questions in a way that meets the audience's needs</p> <p>3.7 Evaluate the effectiveness of a presentation</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>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.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>Skills CFA Assessment Strategy Competence units (S/NVQ)</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Business & Administration (2013) National Occupational Standards:</p> <ul style="list-style-type: none"> CFABAA623 Deliver a presentation

Title:	A/506/1916 Contribute to the development and implementation of an information system
Level:	3
Credit value:	6
GLH:	21
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the design and implementation of an information system	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
2. Be able to contribute to the development of an information system	2.1 Confirm the purpose, use and 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
3. Be able to contribute to the implementation of an information system	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 organisational policies and procedures, and legal and ethical requirements in the implementation of an information system
Additional information about this unit N/A	
Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> CFABAD111 Support the design and development of information system

Title:	F/506/1917 Monitor information systems
Level:	3
Credit value:	8
GLH:	43
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how information systems are used	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
2. Be able to monitor information systems	2.1 Develop a plan to monitor information systems that specifies objectives, scope, timescale, resource implications, the techniques to be used and 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

	<p>2.4 Identify the cause of problems with an information system</p> <p>2.5 Suggest solutions to problems with an information system</p> <p>2.6 Recommend adaptations to the system in response to identified problems or developments</p> <p>2.7 Adhere to organisational policies and procedures, and legal and ethical requirements when monitoring information systems</p>
Additional information about this unit N/A	
Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAD131 Monitor information systems

Title:	M/506/1945 Analyse and present business data
Level:	3
Credit value:	6
GLH:	24
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the analysis and presentation of business data	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 generalizing research findings 1.7 Explain different formats and techniques for the presentation of the analysis
2. Be able to analyse quantitative and qualitative business data	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
3. Be able to present the analysis of business data	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
Additional information about this unit	
N/A	
Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFABAD322 Analyse and report data

Title:	M/502/4300 Using Email
Level:	2
Credit value:	3
GLH:	20
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Use e-mail software tools and techniques to compose and send messages	1.1 Select and use software tools to compose and format e-mail messages, including attachments 1.2 Determine the message size and how it can be reduced 1.3 Send e-mail messages to individuals and groups 1.4 Describe how to stay safe and respect others when using e-mail 1.5 Use an address book to organise contact information
2. Manage incoming e-mail effectively	2.1 Follow guidelines and procedures for using e-mail 2.2 Read and respond to e-mail messages appropriately 2.3 Use email software tools and techniques to automate responses 2.4 Describe how to archive e-mail messages, including attachments 2.5 Organise, store and archive e-mail messages effectively 2.6 Respond appropriately to e-mail problems
Additional information about this unit	
N/A	
Unit aim (s)	This is the ability to make the best use of e-mail software to safely and securely send, receive and store messages.

	<p>This unit is about the skills and knowledge to make effective use of a range of intermediate e-mail software tools to send, receive and store messages for at times non-routine or unfamiliar activities. Any aspect that is unfamiliar may require support and advice from others.</p> <p>Email tools and techniques will be defined as 'intermediate' because:</p> <ul style="list-style-type: none"> • the software tools and functions will be at times non-routine or unfamiliar; and • the techniques required will involve a number of steps and at times be non-routine or unfamiliar. <p>An activity will typically be 'non-routine or unfamiliar' because:</p> <p>the task or context is likely to require some analysis, clarification or research (to separate the components and to identify what factors need to be considered, for example, time available, audience needs, accessibility of source, types of content and meaning) before an approach can be planned; and the user will take some responsibility for developing the input or output of information</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	See <i>IT User Assessment Strategy</i> available from www.e-skills.com
Details of the relationship of the unit and relevant national occupational standards	<p>Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)</p> <p>See http://nos.e-skills.com for examples of content and context applicable to this unit</p>

Title:	R/502/4628 Word processing software
Level:	2
Credit value:	4
GLH:	30
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Enter and combine text and other information accurately within word processing documents	1.1 Identify what types of information are needed in documents 1.2 Use appropriate techniques to enter text and other information accurately and efficiently 1.3 Select and use appropriate templates for different purposes 1.4 Identify when and how to combine and merge information from other software or other documents 1.5 Select and use a range of editing tools to amend document content 1.6 Combine or merge information within a document from a range of sources 1.7 Store and retrieve document and template files effectively, in line with local guidelines and conventions where available
2. Create and modify layout and structures for word processing documents	2.1 Identify the document requirements for structure and style 2.2 Identify what templates and styles are available and when to use them 2.3 Create and modify columns, tables and forms to organise information 2.4 Select and apply styles to text

<p>3. Use word processing software tools to format and present documents effectively to meet requirements</p>	<p>3.1 Identify how the document should be formatted to aid meaning</p> <p>3.2 Select and use appropriate techniques to format characters and paragraphs</p> <p>3.3 Select and use appropriate page and section layouts to present and print documents</p> <p>3.4 Describe any quality problems with documents</p> <p>3.5 Check documents meet needs, using IT tools and making corrections as necessary</p> <p>3.6 Respond appropriately to quality problems with documents so that outcomes meet needs</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This is the ability to use a software application designed for the creation, editing and production of largely text-based documents.</p> <p>This unit is about the skills and knowledge required by an IT user to select and use a range of intermediate word processing software tools and techniques to produce documents that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.</p> <p>Word processing tools and techniques will be described as 'intermediate' because:</p> <ul style="list-style-type: none"> • the software tools and functions will be at times non-routine or unfamiliar; • the choice of techniques will need to take account of a number of factors or elements; and • the user will take some responsibility for the inputting, manipulating and outputting of the information
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>See IT User Assessment Strategy available from www.e-skills.com</p>

Details of the relationship of the unit and relevant national occupational standards

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

See <http://nos.e-skills.com> for examples of content and context applicable to this unit.

Title:	R/502/4631 Website software
Level:	2
Credit value:	4
GLH:	30
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Create structures and styles for websites	1.1 Describe what website content and layout will be needed for each page 1.2 Plan and create web page templates to layout 1.3 Select and use website features and structures to help the user navigate round web pages within the site 1.4 Create, select and use styles to keep the appearance of web pages consistent and make them easy to understand 1.5 Describe how copyright and other constraints may affect the website 1.6 Describe what access issues may need to be taken into account 1.7 Describe what file types to use for saving content 1.8 Store and retrieve files effectively, in line with local guidelines and conventions where available
2. Use website software tools to prepare content for websites	2.1 Prepare content for web pages so that it is ready for editing and formatting 2.2 Organise and combine information needed for web pages including across different software 2.3 Select and use appropriate editing and formatting techniques to aid both clarity and navigation

	<p>2.4 Select and use appropriate development techniques to link information across pages</p> <p>2.5 Change the file formats appropriately for content</p> <p>2.6 Check web pages meet needs, using IT tools and making corrections as necessary</p>
<p>3. Publish websites</p>	<p>3.1 Select and use appropriate testing methods to check that all elements of websites are working as planned</p> <p>3.2 Identify any quality problems with websites and how to respond to them</p> <p>3.3 Select and use an appropriate programme to upload and publish the website</p> <p>3.4 Respond appropriately to problems with multiple page websites</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This is the ability to use a software application designed for planning, designing and building websites.</p> <p>This unit is about the skills and knowledge required by an IT user to select and use a wide range of intermediate website software tools and techniques to produce multiple-page websites. Any aspect that is unfamiliar may require support and advice from others.</p> <p>Website software tools and techniques will be described as 'intermediate' because:</p> <ul style="list-style-type: none"> • the software tools and functions involved will at times be non-routine or unfamiliar; • the choice and use of development techniques will need to take account of a number of factors or elements; and • the user will take some responsibility for planning the website, creating or altering the template, inputting, manipulating, linking and uploading the content

Assessment requirements specified by a sector or regulatory body (if appropriate)	See <i>IT User Assessment Strategy</i> available from www.e-skills.com
Details of the relationship of the unit and relevant national occupational standards	Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009) See http://nos.e-skills.com for examples of content and context applicable to this unit

Title:	F/502/4625 Spreadsheet software
Level:	2
Credit value:	4
GLH:	30
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Use a spreadsheet to enter, edit and organise numerical and other data	1.1 Identify what numerical and other information is needed in the spreadsheet and how it should be structured 1.2 Enter and edit numerical and other data accurately 1.3 Combine and link data across worksheets 1.4 Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available
2. Select and use appropriate formulas and data analysis tools to meet requirements	2.1 Identify which tools and techniques to use to analyse and manipulate data to meet requirements 2.2 Select and use a range of appropriate functions and formulas to meet calculation requirements 2.3 Use a range of tools and techniques to analyse and manipulate data to meet requirements
3. Select and use tools and techniques to present and format spreadsheet information	3.1 Plan how to present and format spreadsheet information effectively to meet needs 3.2 Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets 3.3 Select and format an appropriate chart or graph type to display selected information

	<p>3.4 Select and use appropriate page layout to present and print spreadsheet information</p> <p>3.5 Check information meets needs, using spreadsheet tools and making corrections as necessary</p> <p>3.6 Describe how to find errors in spreadsheet formulas</p> <p>3.7 Respond appropriately to any problems with spreadsheets</p>
Additional information about this unit N/A	
Unit aim (s)	<p>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.</p> <p>This level is about the skills and knowledge required by an IT user to select and use a wide range of intermediate spreadsheet software tools and techniques to produce present and check spreadsheets that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.</p> <p>Spreadsheet software tools and techniques will be described as 'Intermediate' because:</p> <ul style="list-style-type: none"> • the range of data entry, manipulation and outputting techniques will be at times non- routine or unfamiliar; • the tools, formulas and functions need 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
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>See <i>IT User Assessment Strategy</i> available from www.e-skills.com</p>

Details of the relationship of the unit and relevant national occupational standards

Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)

See <http://nos.e-skills.com> for examples of content and context applicable to this unit

Title:	M/502/4622 Presentation software
Level:	2
Credit value:	4
GLH:	30
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Input and combine text and other information within presentation slides	1.1 Identify what types of information are required for the presentation 1.2 Enter text and other information using layouts appropriate to type of information 1.3 Insert charts and tables into presentation slides 1.4 Insert images, video or sound to enhance the presentation 1.5 Identify any constraints which may affect the presentation 1.6 Organise and combine information of different forms or from different sources for presentations 1.7 Store and retrieve presentation files effectively, in line with local guidelines and conventions where available
2. Use presentation software tools to structure, edit and format slide sequences	2.1 Identify what slide structure and themes to use 2.2 Select, change and use appropriate templates for slides 2.3 Select and use appropriate techniques to edit slides and presentations to meet needs 2.4 Select and use appropriate techniques to format slides and presentations 2.5 Identify what presentation effects to use to enhance the presentation 2.6 Select and use animation and transition effects appropriately to enhance slide sequences

<p>3. Prepare slideshow for presentation</p>	<p>3.1 Describe how to present slides to meet needs and communicate effectively</p> <p>3.2 Prepare slideshow for presentation</p> <p>3.3 Check presentation meets needs, using IT tools and making corrections as necessary</p> <p>3.4 Identify and respond to any quality problems with presentations to ensure that presentations meet needs</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This is the ability to use software applications to produce effective presentations, which include a combination of media (e.g. images, animation and sound) for education, entertainment or information sharing.</p> <p>This unit is about the skills and knowledge required by an IT user to select and use a wide range of intermediate presentation software tools and techniques effectively to produce presentations that are at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.</p> <p>Presentation tools and techniques at this level will be described as 'intermediate' because:</p> <ul style="list-style-type: none"> • 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
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>See IT User Assessment Strategy available from www.e-skills.com</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)</p>

	See http://nos.e-skills.com for examples of content and context applicable to this unit
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Title:	F/502/4396 Bespoke software
Level:	2
Credit value:	3
GLH:	20
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Input and combine information using bespoke applications	1.1 Input relevant information accurately so that it is ready for processing 1.2 Select and use appropriate techniques to link and combine information of different forms or from different sources within the software 1.3 Respond appropriately to data entry error messages
2. Use appropriate structures to organise and retrieve information efficiently	2.1 Describe what functions to apply to structure and layout information effectively 2.2 Select and use appropriate structures and/or layouts to organise information 2.3 Apply local and/or legal guidelines and conventions for the storage and use of data where available
3. Use the functions of the software effectively to process and present information	3.1 Select and use appropriate tools and techniques to edit, process and format information 3.2 Check information meets needs, using IT tools and making corrections as necessary 3.3 Select and use appropriate methods to present information

Additional information about this unit	
N/A	
Unit aim (s)	<p>This is the ability to select and use a suitable bespoke software application to carry out an appropriate data processing task. It includes understanding the capabilities of the software and the types of tasks for which it is suitable, as well as the skills and techniques needed to use the software application appropriately and effectively.</p> <p>This unit is about the skills and knowledge needed by an IT User to select and use a wide range of intermediate bespoke software tools and techniques for information that is at times non-routine or unfamiliar. Any aspect that is unfamiliar may require support and advice from others.</p> <p>Bespoke software tools and techniques will be defined as 'intermediate' because:</p> <ul style="list-style-type: none"> • the software tools and functions involved will at times be 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 at times be multi-step; • the user will take some responsibility for inputting, manipulating and outputting the information
Assessment requirements specified by a sector or regulatory body (if appropriate)	See <i>IT User Assessment Strategy</i> available from www.e-skills.com
Details of the relationship of the unit and relevant national occupational standards	<p>Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)</p> <p>See http://nos.e-skills.com for examples of content and context applicable to this unit</p>

Title:	J/502/4559 Data management software
Level:	2
Credit value:	3
GLH:	20
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Enter, edit and maintain data records in a data management system	1.1 Describe the risks to data security and procedures used for data protection 1.2 Enter data accurately into groups of records to meet requirements 1.3 Locate and amend data associated with groups of records 1.4 Check data records meet needs, using IT tools and making corrections as necessary 1.5 Respond appropriately to data entry and other error messages 1.6 Apply local and/or legal guidelines for the storage and use of data where available
2. Retrieve and display data records to meet requirements	2.1 Identify what queries and reports need to be run to output the required information 2.2 Select and use queries to search for and retrieve information to meet given requirements 2.3 Create and view reports to output information from the system to meet given requirements
Additional information about this unit	
N/A	

Unit aim (s)	<p>This is the ability to use a software application designed to store and retrieve data needed for a variety of business functions. It also includes an understanding of the features and facilities of the software and the purpose for which the data is stored. Data management software is often implemented on relational database systems by providing pre-defined file and record structures, processes, reports and data-entry screens. This is about the use of these pre-defined objects.</p> <p>This unit is about selecting and using intermediate data management software tools and techniques to:</p> <ul style="list-style-type: none"> • enter information into data management systems that is at times non-routine or unfamiliar; • retrieve information using multiple selection criteria; and • produce customised reports from the system <p>The data management system tools, functions and techniques at this level are defined as:</p> <ul style="list-style-type: none"> • the software tools and functions involved will at times be non-routine or unfamiliar; and • the choice and use of input, manipulation and output techniques will need to take account of a number of factors or elements <p>Any aspect that is unfamiliar may require support and advice from others.</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>See <i>IT User Assessment Strategy</i> available from www.e-skills.com</p>
Details of the relationship of the unit and relevant national occupational standards	<p>Unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009)</p>

	See http://nos.e-skills.com for examples of content and context applicable to this unit
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Title:	A/506/2130 Deliver customer service
Level:	2
Credit value:	5
GLH:	27
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand customer service delivery	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
2. Understand the relationship between customer service and a brand	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
3. Be able to prepare to deal with customers	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
4. Be able to provide customer service	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
5. Be able to support improvements to customer service delivery	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
Additional information about this unit	
N/A	
Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)

Details of the relationship of the unit and relevant national occupational standards

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

Title:	R/506/2134 Process information about customers
Level:	2
Credit value:	3
GLH:	14
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to process customer information	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
2. Be able to process customer information	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
Additional information about this unit	
N/A	

Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFACSA6 Process information about customers

Title:	Y/506/2149 Develop customer relationships
Level:	2
Credit value:	3
GLH:	18
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to develop customer relationships	1.1 Describe the importance of developing relationships with customers 1.2 Explain the value of customer loyalty and retention 1.3 Explain how customers' expectations may change over time 1.4 Explain the use of customer feedback as a means of developing customer relationships 1.5 Explain the limits of their own authority to make alternative service offers to customers 1.6 Describe the use of Customer Relationship Management systems and processes to meet customers' expectations 1.7 Explain the importance of regular communication in the development of both internal and external customer relationships
2. Be able to develop relationships with customers	2.1 Give help and information that meets or exceeds customers' expectations 2.2 Identify new ways of helping customers based on their feedback 2.3 Share feedback from customers with others 2.4 Identify added value that the organisation could offer customers 2.5 Bring to customers' attention products or services that may interest them

Additional information about this unit	
N/A	
Unit aim (s)	This unit aims to develop the knowledge and skills required to develop customer relationships. Upon completion of this unit, learners will be able to develop relationships with customers.
Assessment requirements specified by a sector or regulatory body (if appropriate)	Skills CFA Assessment Strategy Competence units (S/NVQ)
Details of the relationship of the unit and relevant national occupational standards	Customers Service (2013) National Occupational Standards: <ul style="list-style-type: none"> • CFACSD1 Develop customer relationships

Title:	F/506/1934 Participate in a project
Level:	3
Credit value:	3
GLH:	19
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to manage a project	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
2. Be able to support the delivery of a project	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

Additional information about this unit	
N/A	
Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	All Assessment Criteria must be met and assessed in line with Skills CFA Assessment Strategy.
Details of the relationship of the unit and relevant national occupational standards	CFAM&LDD3

Title:	F/601/8320 Processing customers' financial transactions
Level:	2
Credit value:	4
GLH:	8
Learning outcomes The learner will:	Assessment criteria The learner can:
1 Be able to deal with customer transactions and documentation	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
2 Be able to comply with all codes, laws and regulatory requirements	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

Additional information about this unit	
N/A	
Unit aim (s)	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.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Skill requirements derived from National Occupational Standards for the Financial Services Sector Bank and Building Society Accounts CP01: Process customers' financial transactions Knowledge requirements derived from National Occupational Standards for the Financial Services Sector Bank and Building Society Accounts CP01: Process customers' financial Transactions

Title:	T/505/1238 Payroll processing
Level:	2
Credit value:	5
GLH:	20
Learning outcomes The learner will:	Assessment criteria The learner can:

<p>1. Be able to use HMRC (Her Majesty's Revenue and Customs) approved tools to calculate income tax</p>	<p>1.1 Apply the tax code for an employee from given information</p> <p>1.2 Process pre-tax deductions correctly</p> <p>1.3 Process accurately a variety of Tax Codes using HMRC approved tools:</p> <ul style="list-style-type: none"> • standard suffix codes operated on a cumulative or non-cumulative basis • BR code (Basic Rate) operated on a cumulative basis. • NT (Do not deduct tax for employee) • OT (Allowances are used up, tax is calculated on all pay) • D0 (Deduct at higher rate for all pay) • D1 (Deduct at additional rate for all pay) <p>1.4 Identify the authority required to change an employee's tax code and process the change accurately</p>
<p>2. Be able to determine national insurance (NI) contributions to be deducted from gross pay</p>	<p>2.1 Process accurately for NI categories A, C and D, using approved HMRC Tools:</p> <ul style="list-style-type: none"> • employee NI contributions • employer NI Contributions
<p>3. Be able to determine voluntary deductions and non-standard statutory deductions</p>	<p>3.1 Process voluntary deductions in an appropriate way</p> <p>3.2 Process other statutory deductions:</p> <ul style="list-style-type: none"> • Deductions from earnings orders • Scottish arrestment orders • Student loan repayments
<p>4. Be able to produce relevant pay period report</p>	<p>4.1 Produce a P11 (deductions working sheet available from HMRC) or equivalent</p> <p>4.2 Produce payslips or equivalent, to detail statutory, non-statutory and organisational information regarding employees' individual pay.</p> <p>4.3 Produce payment schedules for different methods of making payments to employees</p>

<p>5. Be able to record and reconcile payments and deductions to employees and external agencies</p>	<p>5.1 Produce an internal payroll summary to record and itemise payments and deductions, including employer's NIC (National Insurance Contributions)</p> <p>5.2 Reconcile payments and deductions made from employees pay with the total payroll</p> <p>5.3 Prepare Employer Payment Summaries in line with the tax authority's requirements</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>The aim of this unit is to provide learners with the ability to use HMRC approved tools to calculate income tax and to determine national insurance contributions to be deducted from gross pay. It also provides learners with the ability to determine voluntary deductions and non-standard statutory deductions and to use these to produce relevant pay period reports and to record and reconcile payments and deductions to employees and external agencies.</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>N/A</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>Direct relationship to the NOS for Accountancy and Finance P-2 and P-3</p>

Title:	A/506/1818 Understand the use of research in business
Level:	2
Credit value:	6
GLH:	40
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the research process	1.1 Describe the main stages in the research process 1.2 Explain the importance of scoping research and setting the research objectives 1.3 Explain the importance of identifying the limitations of research methods 1.4 Explain the difference between primary and secondary research 1.5 Describe the difference between quantitative and qualitative research methods 1.6 Describe the advantages and disadvantages of different research methods 1.7 Describe the use of different analytical techniques in the research process 1.8 Explain the importance of validity and reliability in the research process
2. Understand how to use research in business	2.1 Outline the limitations of applying research outcomes 2.2 Explain why and how to use sources of current and archived business information 2.3 Explain how to validate research information 2.4 Describe the purpose and applications of research in business 2.5 Describe organisational conventions and formats for presenting research reports

	2.6 Explain the organisational policy for acknowledging sources of information 2.7 Explain ways in which ethics can affect the conduct and use of research
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop knowledge and understanding regarding the use of research in business. Upon completion of this unit, learners will have an understanding of the research process and will also understand how research can be used in business.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	Business & Administration (2013) National Occupational Standards : <ul style="list-style-type: none"> • CFABAD323 Research information

Title:	D/506/1939 Understand the legal context of business
Level:	3
Credit value:	6
GLH:	44
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the legal framework within which businesses operate	1.1 Explain the legal requirements of different types of business 1.2 Describe the roles and powers of government departments and agencies in regulating business 1.3 Explain the legal provisions relating to intellectual property
2. Understand the principles of business governance	2.1 Explain the corporate governance statutory framework of a business 2.2 Explain the roles and responsibilities of an organisation's governing body 2.3 Explain the financial reporting requirements of an organisation
3. Understand how contract law affects a business	3.1 Explain the elements of a valid business contract 3.2 Analyse different types of contracts 3.3 Explain the difference between negligence and liability 3.4 Explain the liabilities and entitlements of sellers and purchasers of goods and services
4. Understand the requirements of employment law	4.1 Describe the sources, institutions and enforcement systems for individual employment rights 4.2 Explain the features of types of worker and employment contracts for service 4.3 Explain the implications of contracts of service and contracts for service

	<p>4.4 Explain the implications of different types of employment status</p> <p>4.5 Explain the requirements for an organisation for health and safety</p> <p>4.6 Explain the requirements for an organisation for equality and diversity</p> <p>4.7 Explain the implications for an organisation of wrongful dismissal, unfair dismissal and redundancy</p> <p>4.8 Describe the impact of human rights legislation on the employment relationship</p>
<p>Additional information about this unit</p> <p>N/A</p>	
Unit aim (s)	<p>This unit aims to develop knowledge and understanding regarding the legal context of business. Upon completion of this unit, learners will have developed an understanding of the legal framework within which businesses operate. Learners will also have an awareness of the key principles of business governance, the impact of contract law on business, and the requirements of employment law.</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>N/A</p>
Details of the relationship of the unit and relevant national occupational standards	<p>Business & Administration (2013) National Occupational Standards</p>

Title:	K/503/8194 Principles of customer relationships
Level:	2
Credit value:	3
GLH:	18
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand customers and their needs	1.1 Describe the importance of understanding customers' wants and needs 1.2 Explain the role of segmentation in identifying customers' likely wants and needs 1.3 Describe the factors that motivate customers to buy 1.4 Explain the importance of seeking customer feedback on performance, products and/or services
2. Understand an organisation's responses to customer relationships	2.1 Describe an organisation's marketing objectives and activities 2.2 Explain the importance of developing customer service plans and customer relationship plans 2.3 Describe an organisation's system for relationship management 2.4 Describe an organisation's customer care programme 2.5 Describe the system for communicating with customers 2.6 Explain the importance of a consistent level of service 2.7 Explain the link between customer satisfaction and sales growth 2.8 Explain the importance of using customer feedback to enhance performance, products and/or services
3. Understand the principles of customer relationship management	3.1 Explain the concept and principles of relationship management

	<p>3.2 Explain the importance of keeping promises made to customers</p> <p>3.3 Explain the importance of balancing customers' needs with those of the organisation</p> <p>3.4 Explain the importance of keeping customers informed of progress, problems, issues and the actions undertaken in support of them</p> <p>3.5 Explain how to identify added value that could be offered to customers</p>
<p>Additional information about this unit</p> <p>N/A</p>	
Unit aim (s)	<p>This unit concerns understanding customers and their needs, organisations' responses to customer relationships and customer relationship management</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Sales Assessment Strategy.</p>
Details of the relationship of the unit and relevant national occupational standards	<p>This unit is linked to Council for Administration NOS;</p> <p>Marketing 7.1.2 Build and deliver customer service and customer care support</p> <p>Marketing 7.1.3 Build and retain effective sales relationships</p> <p>Marketing 7.1.4 Assist in the development of sales support and customer management programmes</p> <p>ICS unit D1</p>

Title:	R/506/2294 Principles of team leading
Level:	2
Credit value:	5
GLH:	37
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand leadership styles in organisations	1.1 Describe characteristics of effective leaders 1.2 Describe different leadership styles 1.3 Describe ways in which leaders can motivate their teams 1.4 Explain the benefits of effective leadership for organisations
2. Understand team dynamics	2.1 Explain the purpose of different types of teams 2.2 Describe the stages of team development and behaviour 2.3 Explain the concept of team role theory 2.4 Explain how the principle of team role theory is used in team building and leadership 2.5 Explain typical sources of conflict within a team and how they could be managed
3. Understand techniques used to manage the work of teams	3.1 Explain the factors to be taken into account when setting targets 3.2 Describe a range of techniques to monitor the flow of work of a team 3.3 Describe techniques to identify and solve problems within a team
4. Understand the impact of change management within a team	4.1 Describe typical reasons for organisational change 4.2 Explain the importance of accepting change positively

	<p>4.3 Explain the potential impact on a team of negative responses to change</p> <p>4.4 Explain how to implement change within a team</p>
5. Understand team motivation	<p>5.1 Explain the meaning of the term "motivation"</p> <p>5.2 Explain factors that affect the level of motivation of team members</p> <p>5.3 Describe techniques that be used to motivate team members</p> <p>5.4 Explain how having motivated staff affects an organisation</p>
Additional information about this unit N/A	
Unit aim (s)	This unit aims to develop knowledge and understanding required to lead a team. Upon completion of this unit, learners will have developed an understanding of key team leading principles, including leadership styles, team dynamics and team motivation. Learners will also develop an understanding of techniques used to manage the work of teams and the impact of change management within a team.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	CFAM&LBA3

Title:	J/506/1806 Principles of equality and diversity in the workplace
Level:	2
Credit value:	2
GLH:	10
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the implications of equality legislation	1.1 Define the concept 'equality and diversity' 1.2 Describe the legal requirements for equality of opportunity 1.3 Describe the role and powers of organisations responsible for equality 1.4 Explain the benefits of equal opportunities and diversity 1.5 Explain the potential consequences for an organisation of failing to comply with equality legislation
2. Understand organisational standards and expectations for equality and diversity and context in the workplace	2.1 Explain how organisational policies on equality and diversity translate into day to day activity in the workplace 2.2 Describe their own responsibilities for equality and diversity in the workplace 2.3 Describe behaviours that support equality, diversity and inclusion in the workplace
Additional information about this unit	
N/A	

Unit aim (s)	This unit aims to develop knowledge and understanding regarding equality and diversity, and will introduce learners to the key principles underpinning equality and diversity in the workplace. Upon completion of this unit, learners will understand the implications of equality legislation and will understand organisational standards and expectations for equality and diversity in the workplace.
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	CFAM&LBA7

Title:	D/502/9928 Principles of marketing theory
Level:	2
Credit value:	4
GLH:	30
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand how to segment the market	1.1 Explain the importance of defining market segments 1.2 Describe the difference between market segments and customer classifications 1.3 Explain how to cluster customers with similar characteristics 1.4 Describe how a range of products may appeal to different market segments 1.5 Describe the importance of valid and reliable marketing data to segmenting the market 1.6 Explain the strengths and weaknesses of different marketing data collection methods 1.7 Describe the use of Customer Relationship Management (CRM) activities and systems
2. Understand the value of marketing	2.1 Describe the role of marketing in enhancing the sale of products and/or services 2.2 Explain the significance of customer loyalty to the achievement of marketing objectives 2.3 Explain the role of performance indicators and evaluation arrangements 2.4 Describe the factors to be taken into account when assessing the cost and value of marketing activities 2.5 Explain the significance of brand and reputation to sales performance

<p>3. Understand the principles of socially responsible marketing</p>	<p>3.1 Explain the scope and purpose of socially responsible marketing</p> <p>3.2 Explain the importance of involving stakeholders in socially responsible marketing activities</p> <p>3.3 Explain how core values are expressed through coherent branding and chosen communication methods</p> <p>3.4 Explain the requirements of socially responsible marketing campaigns</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit concerns understanding how to segment the market, the value of marketing and the principles of socially responsible marketing</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Sales Assessment Strategy.</p>
<p>Details of the relationship of the unit and relevant national occupational standards</p>	<p>This unit is linked to Council for Administration NOS;</p> <p>Marketing 1.2.7 Collect data on the knowledge, attitudes and behaviours of target groups</p> <p>Marketing 1.3.3 Establish and understand potential market segments</p> <p>Marketing 1.3.4 Establish target market segments for products/services and evaluate their potential</p> <p>Marketing 1.3.6 Analyse, interpret and synthesise data and research findings to inform social marketing strategy</p> <p>Marketing 2.1.3 Demonstrate the value of marketing to the organisation</p> <p>Marketing 4.1.3 Manage communications for social marketing programmes</p>

Title:	D/502/9931 Principles of digital marketing
Level:	2
Credit value:	5
GLH:	40
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the role of digital marketing	1.1 Explain the role of digital marketing within the overall marketing strategy 1.2 Explain the strengths and weaknesses of digital marketing 1.3 Explain the importance of targeted digital marketing 1.4 Describe the sources of data lists for use in targeting customers and potential customers 1.5 Explain the legal requirements and implications of digital marketing 1.6 Describe the importance of digital data capture systems for digital marketing
2. Understand the use of search engine optimisation (SEO)	2.1 Describe the use of SEO 2.2 Explain the importance of SEO 2.3 Explain the advantages and disadvantages of links to other websites
3. Understand the requirements of marketing research using the internet	3.1 Explain how to use search-related internet facilities to enable the identification and retrieval of targeted information 3.2 Explain the advantages and disadvantages of different internet data collection sources 3.3 Explain the importance of confirming the accuracy of information retrieved from the internet

<p>4. Understand the uses of digital marketing devices and messages</p>	<p>4.1. Describe the potential uses of a Customer Relationship Management (CRM) system</p> <p>4.2. Explain the importance of data cleansing</p> <p>4.3. Describe the use of digital marketing devices</p> <p>4.4. Describe the use of digital response systems</p> <p>4.5. Explain the advantages and disadvantages of different tracking systems</p>
<p>5. Understand how to use digital technology for marketing purposes</p>	<p>5.1 Explain how to use a CRM system</p> <p>5.2 Explain how to maintain the currency and accuracy of digital databases</p> <p>5.3 Explain the advantages and disadvantages of different digital technologies</p> <p>5.4 Describe the importance of tailoring messages to different digital media</p> <p>5.5 Explain the potential for marketing to social networking sites</p> <p>5.6 Explain how to prevent marketing messages being identified as 'spam'</p>
<p>Additional information about this unit</p> <p>N/A</p>	
<p>Unit aim (s)</p>	<p>This unit concerns understanding the role of digital marketing, the use of search engine optimisation (SEO), the requirements of marketing research using the internet, the uses of digital marketing device and messages and how to use digital technology for marketing purposes</p>
<p>Assessment requirements specified by a sector or regulatory body (if appropriate)</p>	<p>All Assessment Criteria must be met. The method of assessment is determined by individual awarding organisations, in compliance with the CfA Sales Assessment Strategy.</p>

Details of the relationship of the unit and relevant national occupational standards	This unit is linked to Council for Administration NOS; Marketing 4.3.8 Market to target customers using digital/electronic media Marketing 4.3.9 Communicate using multiple digital marketing channels
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Title:	L/506/2083 Understand working in a customer service environment
Level:	1
Credit value:	3
GLH:	25
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Know the importance of customer service	1.1 State what is meant by "customer service" 1.2 State why effective customer service is important to an organisation
2. Know the factors affecting customer service	2.1 Outline the difference between an internal and an external customer 2.2 State how to identify customers' needs and expectations 2.3 List information sources needed to deliver reliable customer service 2.4 Describe the relationship between customer expectations and customer satisfaction
3. Know how to work in a customer service role	3.1 Identify personal behaviours that can positively affect customers' perceptions of an organisation and its products and/or services 3.2 Identify the job roles within a team delivering customer service 3.3 State the standards of personal presentation and behaviour expected by customer service staff in different organisations 3.4 State standards and practices that relate to a service offer within different types of organisation 3.5 Describe how legislation and organisational requirements affect what can be promised or carried out in

	<p>a customer service role</p> <p>3.6 Describe the procedures for protecting customers' personal information and safety</p> <p>3.7 State the importance of protecting the safety of customers' personal information and safety</p>
4. Know how to refer customer queries and problems to others	<p>4.1 Describe types of customer behaviour that show when a customer is dissatisfied</p> <p>4.2 State the procedures to be followed when dealing with customer queries or problems</p> <p>4.3 State to whom to refer customer queries and problems</p>
<p>Additional information about this unit</p> <p>N/A</p>	
Unit aim (s)	<p>This unit aims to develop knowledge and understanding regarding working effectively in a customer service environment. Upon completion of this unit, learners will have developed knowledge of the importance of customer service and an awareness of the factors affecting customer service. Learners will also know how to work in a customer service role and will know how to refer customer queries and problems to others.</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	<p>This unit is linked to Council for Administration NOS for Customer Services</p>

Title:	R/505/3515 Know how to publish, integrate and share using social media
Level:	2
Credit value:	5
GLH:	40
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Know the current social networks used to publish, integrate and share online	1.1 Identify the main social media networks in current use 1.2 Describe the main features of each social media network identified 1.3 Describe why they would use each of the social media networks identified 1.4 Explain the purpose of a 'social aggregator' tool 1.5 Describe how blogs give individuals a voice on the Web 1.6 Explain how professionals make connections using social media networks
2. Understand how social media is used by individuals, organisations/businesses, governments and social groups	2.1 Describe why <ul style="list-style-type: none"> • individuals • organisations/businesses • governments • social groups use social media networking sites 2.2 Explain the advantages and typical components of a social media user profile 2.3 Identify the benefits of using social media networking for: <ul style="list-style-type: none"> • individuals • organisations/businesses • governments • social groups 2.4 Identify the risks of using social media networking for: <ul style="list-style-type: none"> • individuals • organisations/businesses • governments • social groups 2.5 Describe how social media networks

	monitor engagement with their websites 2.6 Describe the advantages of podcasting 2.7 Explain why organisations have social media policies
3. Understand best practices for safe social networking	3.1 Describe appropriate precautions to ensure their own safety and privacy 3.2 Describe how to protect personal information when engaging with social media websites 3.3 Identify legal constraints on the uploading and downloading of software and other digital content
4. Use browser software to communicate information online	4.1 Select and use appropriate tools and techniques to communicate information online 4.2 Use browser tools to share information sources with others 4.3 Submit information online 4.4 Identify opportunities to create, post or publish material to social media websites
5. Understand the need for safety and security practices	5.1 Describe the danger of computer viruses and how to minimise risks 5.2 Describe how to minimise threats to information security when online 5.3 Describe how to minimise the threats to user safety when online 5.4 Describe where to access online help and information when using social media networks
Additional information about this unit N/A	

Unit aim (s)	<p>The aim of this unit is to provide learners with an understanding of the current social networks used to publish, integrate and share online and how social media is used by individuals, organisations/businesses, governments and social groups. It also provides learners with an understanding of best practices for safe social networking and the need for safety and security practices. This unit will also provide learners with the ability to use browser software to communicate information online.</p>
Assessment requirements specified by a sector or regulatory body (if appropriate)	<p>N/A</p>
Details of the relationship of the unit and relevant national occupational standards	<p>N/A</p>

Title:	F/505/6880 Exploring social media
Level:	2
Credit value:	2
GLH:	16
Learning outcomes The learner will:	Assessment criteria The learner can:
1. Understand the opportunities and threats associated with using social media.	1.1 Describe the positive and negative aspects of using social media 1.2 Describe how to minimise risks associated with using social media
2. Understand the application of social media.	2.1 Describe how various social media sites may be used by groups, individuals, businesses and organisations 2.2 Demonstrate the use of various social media sites to communicate and upload content including: <ul style="list-style-type: none"> • Facebook • Blogging • Twitter • YouTube 2.3 Describe how businesses and organisations may use social media to promote products and services
Additional information about this unit	
N/A	
Unit aim (s)	This unit will enable the learner to understand how use social media safely
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	N/A

Title:	L/505/3514 Understand the safe use of online and social media platforms
Level:	2
Credit value:	4
GLH:	35
Learning outcomes The learner will:	Assessment criteria The learner can:
<p>1 Understand that information stored on personal computers and mobile devices must be safeguarded</p>	<p>1.1 Identify the potential risks to information security of using personal computers and mobile devices for:</p> <ul style="list-style-type: none"> • using email • web browsing • banking online • shopping online • social networking <p>1.2 Describe the security risks associated with:</p> <ul style="list-style-type: none"> • hardware • software • social media networking • access to malicious websites • access to inappropriate material published on the Internet • corrupted or infected email attachments <p>1.3 Explain the importance of controlling access to hardware, software and stored data</p> <p>1.4 Describe the common types of scams and frauds:</p> <ul style="list-style-type: none"> • phishing • pharming • hacking <p>1.5 Explain the importance of developing and maintaining safe ICT user habits</p>

<p>2 Know how to select and use appropriate security methods to safeguard systems and data</p>	<p>2.1 Describe security techniques/measures that can protect personally accessed software and data, such as login identity and passwords</p> <p>2.2 Describe common ways of controlling access to hardware, software and data</p> <p>2.3 Identify ways to protect data and software</p> <p>2.4 Describe the term 'virus' and give examples of different types</p> <p>2.5 Describe the purpose of anti-virus software</p> <p>2.6 Explain why anti-virus software should be regularly updated</p> <p>2.7 Explain the importance of backing up and safely storing data</p>
<p>3 Understand the threats to personal safety when using the Internet</p>	<p>3.1 Describe the forms and features of:</p> <ul style="list-style-type: none"> • cyber bullying • grooming • stalking • criminal activities • inappropriate contact • inappropriate content <p>3.2 Identify when and how to report online safety issues</p> <p>3.3 Describe the risks and consequences of:</p> <ul style="list-style-type: none"> • identity theft • identity fraud <p>3.4 Describe how user accounts can be used as a security measure when computers are used by more than one person</p> <p>3.5 Explain the importance of setting parental controls on personal computers, mobile and media devices</p> <p>3.6 Explain how to set up parental controls on:</p> <ul style="list-style-type: none"> • personal computers • tablets • mobile phones

<p>4 Know how to protect their online devices against fraud and security attacks</p>	<p>4.1 Set up security measures to protect their personal computers and mobile devices against fraud and security threats</p> <p>4.2 Describe measures that can help to protect their personal information</p> <p>4.3 Describe the risks posed by unsolicited email and measures that can reduce the risks</p> <p>4.4 Identify the security threats when accessing public WiFi networks</p>
<p>5 Understand the implications of entering personal information onto social media networking sites</p>	<p>5.1 Explain the concept of no 'take backs' once information is posted online</p> <p>5.2 Identify who can view information posted onto social media networking websites</p> <p>5.3 Explain the privacy issues of using social media websites</p> <p>5.4 Describe formal and informal conventions, or netiquette, which should be observed when communicating online</p> <p>5.5 Describe the potential consequences of posting their personal information onto social media websites</p> <p>5.6 Identify the security risks of adding geographic identity or location to material they upload to the Internet</p>
<p>6. Understand legal measures that address the protection of data</p>	<p>6.1 Identify relevant legislation and guidelines relating to</p> <ul style="list-style-type: none"> • downloading images and files from the Internet • data protection <p>6.2 Identify data protection issues around the use of social media</p> <p>6.3 Describe what is meant by the following terms:</p> <ul style="list-style-type: none"> • copyright • plagiarism • intellectual property <p>6.4 Explain why organisations develop and adopt policies for the acceptable use of ICT</p> <p>6.5 Describe the common components of an Acceptable Use Policy</p>

Additional information about this unit	
N/A	
Unit aim (s)	The aim of this unit is to provide learners with an understanding that information stored on personal computers and mobile devices must be safeguarded, that their online devices must be protected against fraud and security attacks and the nature of the threats to their personal safety when using the Internet. It also provides learners with an understanding of entering personal information onto social media networking sites and the legal measures that address the protection of data
Assessment requirements specified by a sector or regulatory body (if appropriate)	N/A
Details of the relationship of the unit and relevant national occupational standards	N/A

