

Learning Assessment Guide

Unit Standard 121 – Version 5

Use office administration and communication systems

Level 2 – 5 Credits

Assessment Summary			
Learner to complete			
Learner's name:			
Employer:			
NSN no. (ROL):		DOB:	
Signed:		Date:	
Assessor to complete			
<input type="checkbox"/> Meets requirements <input type="checkbox"/> More training required <input type="checkbox"/> More evidence required			
Assessor's name:		Assessor's No.	
Signed:		Date:	

Before you begin...

- As well as this Learning Assessment Guide, you may also want to refer to the unit standard from the NZQA website (<http://www.nzqa.govt.nz>).
- Read the Trainee Information Kit. The kit contains important information and guidelines for Learners and can be found on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.
- Check the learning resources available for this unit standard on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.

This Learning Assessment Guide is made up of:

- Tasks for you to complete.
- The Assessment Results that your assessor will use to assess your competence.

The tasks in this assessment are designed to show your assessor that you can:

- 1 Describe office administration functions.
- 2 Use office administration systems.
- 3 Use office communication systems.

Assessment Task One – Element One

This task is designed to assess your ability to describe office administration functions.

Task Instructions

Answer the following questions. You may answer either on the question sheet or orally. Your assessor may ask you further questions if clarification is required.

Question One

Give a description of the services provided by **four** office functions. You may describe the functions listed or add others if you wish.

Function	Service
Managing information	
Processing and recording numerical data	
Providing clerical services	
Providing customer service	

Question Two

Describe your organisation's policies and procedures for maintaining security and confidentiality of information with regard to the following requirements. You may add other security requirements in place of those listed if you wish.

Security Requirement	Policy/Procedure
Access to information sources	
Access to office and physical resources	
Screening and supervision of visitors	
Storage and disposal of information	
Storage and disposal of information	
Storage and disposal of information	

Question Three

Describe your organisation's policies and procedures for establishing and maintaining a safe and healthy office environment with regards to **five** of the following:

Requirement	Description
Room temperature	
Humidity	
Ventilation	
Work station design and location	
Noise	
Lighting	
First aid facilities	
Security provisions	

Assessment Task Two – Elements 2 and 3

This task is designed to assess your ability to use office administration and communication systems.

Task Instructions

Ask your manager to verify your competence in performing office administration and communication tasks. The following Verification Form details the requirements in full. Please read it carefully and ask your manager to complete it.

All tasks must follow your organisations policies and procedures.

The required tasks include:

- Planning and prioritising your workload.
- Using internal and external mail systems.
- Using office equipment including a photocopier.
- Filing documents.
- Completing business forms and calculations.
- Using the telephone system and fax machine.
- Recording and delivering communications.

As you complete each task, tick it off on the Verification Form and list the evidence provided. If the Manager observed you performing the task, state this. Then give the form and evidence to your manager to complete the Yes/No column and add any comments they may have. They must then sign it and the form with evidence is to be forwarded to your assessor.

You must provide your assessor with as much supporting evidence as possible. Evidence may include communications, business forms, fax transmission reports etc.

Verification Form

Unit Standard 121 Version 5: Use office administration and communication systems.

<p>To: Manager or Supervisor</p> <p>_____ (name of learner) is currently being assessed for the above unit standard.</p> <p>Your knowledge of the learner and his/her work is sought to confirm that the learner perform the following tasks to the standard required by your organisation's policies and procedures. The learner will complete the task and list the evidence provided. If the evidence is your observation of the task they will state this. They will then give you the form and hard copy evidence for you to complete the Yes/No column and sign. You may also add comments.</p>		
Task	Evidence	Yes/No (Manager's use only)
Use Office Administration Systems		
<p>Policies and procedures for organising workload are followed. This includes:</p> <p><input type="checkbox"/> planning</p> <p><input type="checkbox"/> prioritising</p> <p><input type="checkbox"/> allocating time for tasks</p> <p><input type="checkbox"/> organising the work station</p> <p><input type="checkbox"/> managing communications. (please tick)</p>		
<p>Internal and external mail systems are used including standard and specialist services.</p>		
<p>A copier and four other types of office equipment are used in accordance with their operating instructions and organisational practice. This does not include communication equipment.</p> <p><input type="checkbox"/> Copier</p> <p><input type="checkbox"/> _____</p> <p><input type="checkbox"/> _____</p> <p><input type="checkbox"/> _____</p> <p><input type="checkbox"/> _____</p> <p>(please tick)</p>		

Task	Evidence	Yes/No
Documents are filed in accordance with filing system requirements.		
<p>Four different types of business forms and calculations are completed. These may include:</p> <ul style="list-style-type: none"> <input type="checkbox"/> customer information <input type="checkbox"/> sales and purchase orders <input type="checkbox"/> payment records <input type="checkbox"/> invoices <input type="checkbox"/> statements <input type="checkbox"/> receipts <input type="checkbox"/> bank deposits <input type="checkbox"/> other. (please tick) 		
Use Office Communication Systems		
<p>Appropriate telephone techniques and system features are used to perform the following tasks:</p> <ul style="list-style-type: none"> <input type="checkbox"/> answer calls <input type="checkbox"/> process telephone enquiries <input type="checkbox"/> take messages <input type="checkbox"/> transfer calls (please tick) 		
Facsimile features are used to send and receive messages in accordance with the equipment instructions.		

Task	Evidence	Yes/No
<p>Three different forms of communications are recorded and delivered appropriate to the communication type. Communications may include receiving and relaying:</p> <p><input type="checkbox"/> oral</p> <p><input type="checkbox"/> written</p> <p><input type="checkbox"/> visual</p> <p><input type="checkbox"/> electronic communications. (please tick)</p>		
<p><i>Manager's Comments</i></p>		
Name of Verifier	E-mail:	
Position:	Phone:	
Date:	Signature:	

Assessment Results

These are the judgements that your assessor will use to assess you:

Has the learner described the functions of an office in terms of services provided?	Yes	No
Has the learner described organisational policies and procedures in terms of the requirements for maintaining security and confidentiality of information?	Yes	No
Has the learner described organisational policies and procedures in terms of the requirements for establishing and maintaining a safe and healthy office environment?	Yes	No
Did the learner follow organisational policies and procedures for organising their workload including planning, prioritising, allocating time, organising the work station and managing communications?	Yes	No
Did the learner use systems for processing internal and external mail including standard and specialist services?	Yes	No
Did the learner correctly use one piece of copying equipment and four other pieces of office equipment?	Yes	No
Did the learner file documents in accordance with the filing system and organisational requirements?	Yes	No
Did the learner complete at least four different types of business forms and calculations?	Yes	No
Did the learner use telephone communication techniques to answer and transfer calls, process enquiries and take messages in accordance with system features and organisational requirements?	Yes	No
Did the learner send and receive facsimiles in accordance with the operating instructions and organisational policies and procedures?	Yes	No
Did the learner record and deliver at least three different sorts of communications in accordance with procedures and in the appropriate manner?	Yes	No