

# Learning Assessment Guide

## Unit Standard 122 – Version 5

### Provide office reception services

### Level 3 – 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 assessment guide is made up of:

- Task sheets for you to complete.
- A Verification Form for completion by your Manager or assessor.
- Assessment results that the assessor will use to assess your competence.

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

- explain the receptionist function within an organisation,
- provide reception services and
- evaluate and maintain the reception area.

Special notes relating to this unit standard:

1. All activities associated with this unit standard must comply with occupational health and safety guidelines and recommendations in relation to working environment and work practices, available from the Department of Labour at <http://www.osh.dol.govt.nz/order/catalogue/index.shtml>, and the requirements of: Health and Safety in Employment Act 1992, Copyright Act 1994, Human Rights Act 1993, Privacy Act 1993, and their subsequent amendments.
2. Definitions  
*Time management skills* include but are not limited to – analysis of activities, prioritisation of tasks, budgeting of time, identification of time wasters, review of use of time.  
*Listening skills* include but are not limited to – hearing, comprehending, remembering.

## Assessment Task One – Elements 1 and 2

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### Introduction

This assessment is designed to assess your ability to:

- explain the reception function within an organisation; and
- demonstrate techniques for assisting internal and external clients with specific needs.

### Instructions

- You will need to answer the supplied questions.
- These questions can be answered verbally or in writing. Discuss your preference with your assessor.
- If you answer verbally your assessor will note your answers on your question sheet.
- If you complete them in writing your assessor may wish to ask further questions to clarify your responses or to have you expand on your answers to meet sufficiency requirements.

### The evidence required for assessment task one will include:

- Answers to questions
- Assessor's notes where relevant.

### Task One Questions

To be completed by the learner.

#### Question One

Give a detailed explanation of at least three duties that help the receptionists interface with the public/clients and the organisation. Duties may include but are not limited to:

- receiving people coming into the organisation personally
- managing telephone enquiries
- ascertaining callers' requirements and providing information and/or directing them within the organisation
- presenting a positive image for the organisation
- providing a high standard of customer service.

**Question Two**

What are the key responsibilities of a receptionist that require the application of personal skills? Give detailed information on at least four. Responsibilities may include but are not limited to:

- receiving callers and processing enquiries
- screening callers
- making appointments
- managing telephone systems
- keeping telecommunication records
- providing information
- routine clerical and text processing duties
- maintaining the reception area.

**Question Three**

What are the policies and procedures in your organisation that relate to business and client confidentiality and discretion?

**Question Four**

What are the non-verbal communication factors that you use as a receptionist? Give detailed information on at least four. For each, say how the factor could be used to create either a positive or negative impact. Non-verbal communications may include but are not limited to:

- body language
- physical characteristics and appearance
- facial expressions
- gestures and body movements
- posture
- voice
- space
- physical environment
- time.

Factor	Positive Impact	Negative Impact

**Question Five**

What responsibilities does the receptionist have in the areas of understanding and promoting the organisation and its products and services, and in retaining client support?

**Question Six**

What organisational policies and procedures and legislative requirements are there for establishing and maintaining a safe and healthy environment in the reception area?

**Question Seven**

What emergencies and crises may arise in your reception area? Identify three, and for each, explain what the role of the receptionist is should the emergency or crisis occur. These may include but are not limited to:

- emergency procedures for fire, earthquake, hold-up, bomb scare
- contact information for emergency services and for safety officer
- contact information
- procedures for medical and first aid emergencies.

**Question Eight**

What techniques can be used to assist internal and external clients with specific needs? Explain techniques for two different types of special needs situations. Specific needs may include, but are not limited to – language interpretation, physical or intellectual disability, cultural sensitivity.

Specific Need	Technique

## Assessment Task Two – Elements 2 and 3

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### Introduction

This assessment is designed to assess your ability to:

- provide reception services; and
- maintain the reception area.

### Instructions

- You will need to arrange for your assessor to observe you carrying out reception duties.
- Your assessor is also likely to ask you a few questions related to your management of your time, the telephone system, and the reception area.
- The assessor will use the 'Observation Checklist' to assess and record your performance. Read this through so you are aware of what your assessor will be looking for.
- Your assessor may nominate somebody in your organisation to complete these observations if s/he is not readily available. In that case they must complete the enclosed Verification Form.

### The evidence required for assessment task one will include:

- Observation Checklist
- Completed Verification Form.

**Observation Checklist**  
(For use by assessor or approved observer)

<b>Name of learner:</b>	
<b>Name of observer assessor:</b>	
<b>Date and Time observation took place.</b>	

Please indicate if the learner has met the criteria. Use the space to add comment for feedback to the learner and for moderation purposes.

<b>Observed that the learner...</b>	<b>Comment</b>	<b>Yes / No</b>
<p>Observe the Learner using the following office facilities and/or systems. Describe what you observed:</p> <ul style="list-style-type: none"> <li>• recording appointments</li> <li>• managing diaries</li> <li>• maintaining reception records.</li> </ul> <p>Were all these completed according to organisational policies and procedures?</p>	<p>Yes / No</p>	
<p>Observe the Learner prioritising and processing at least four requests for information. Such information may include but is not limited to:</p> <ul style="list-style-type: none"> <li>• mission statement</li> <li>• corporate plan</li> <li>• annual reports</li> <li>• management and /or administrative policies, staff information</li> <li>• inter-organisational and inter-company connections</li> <li>• product and service information</li> <li>• client information.</li> </ul>	<p>List four requests that you observed being processed.</p> <p>1 _____</p> <p>2 _____</p> <p>3 _____</p> <p>4 _____</p>	

Observed that the learner...	Comment	Yes / No
Were all processed according to organisational requirements?	Yes / No	
<p>Observe the Learner using the telephone system.</p> <p>Were all processed according to organisational requirements?</p>	<p>Tick at least four of the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> receiving and re-directing telephone calls</li> <li><input type="checkbox"/> placing calls</li> <li><input type="checkbox"/> operating voice mail systems</li> <li><input type="checkbox"/> taking messages</li> <li><input type="checkbox"/> operating telepaggers, facsimile, and answering machine</li> <li><input type="checkbox"/> maintaining telecommunication records.</li> </ul> <p>Yes/No</p>	
<p>Observe the Learner demonstrating communication, interpersonal and time management skills with internal and external clients.</p> <p><i>Time management skills</i> include but are not limited to analysis of activities, prioritisation of tasks, budgeting of time, identification of time wasters, review use of time.</p> <p><i>Listening skills</i> include but are not limited to hearing, comprehending, remembering.</p>	<p>Tick at least four of the following and make any other relevant notes below.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> receiving people</li> <li><input type="checkbox"/> greeting appropriately</li> <li><input type="checkbox"/> welcoming enquiries</li> <li><input type="checkbox"/> ascertaining requirements</li> <li><input type="checkbox"/> providing assistance</li> <li><input type="checkbox"/> receiving and relaying messages promptly</li> <li><input type="checkbox"/> assuring confidentiality</li> <li><input type="checkbox"/> treating people and information with respect</li> <li><input type="checkbox"/> resolving conflicts</li> <li><input type="checkbox"/> managing stress</li> <li><input type="checkbox"/> working within a team</li> <li><input type="checkbox"/> using listening skills</li> <li><input type="checkbox"/> prioritising.</li> </ul> <p><i>Further notes</i></p>	

Observed that the learner...	Comment	Yes / No
Were all interactions conducted according to organisational policies and procedures?	Yes/No	
<p>Observe the Learner demonstrating positive and suitable non-verbal communication in their interactions with internal and external clients.</p> <p>This may include but is not limited to:</p> <ul style="list-style-type: none"> <li>• body language</li> <li>• personal presentation</li> <li>• facial expressions</li> <li>• gestures and body movements</li> <li>• posture.</li> </ul>		
<p>If the occasion arises, observe the Learner using techniques for assisting internal and external clients with specific needs. Evidence is required of <b>two</b> different specific needs situations.</p> <p>Specific needs may include but are not limited to</p> <ul style="list-style-type: none"> <li>• cultural sensitivity</li> <li>• language interpretation</li> <li>• physical disabilities.</li> </ul>		

Observed that the learner...	Comment	Yes / No
Are the techniques used in accordance with organisational policies and procedures?	Yes/No	
Observe the Learner implementing procedures for maintaining an effective reception area in accordance with organisational policies and procedures.		

**Assessor / Observer:**

**Signature:**

**Date of observation:**

### Verification Form

<b>Name of learner:</b>			
<b>Name of verifier</b>			
<b>Position</b>		<b>Phone</b>	

\_\_\_\_\_ is currently being assessed for Unit standard 122 Provide office reception services. Your signature on this form is required to confirm that you have observed the Learner performing the reception tasks as listed in the Observation Form.

Comments:

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Thank you for your assistance.

## Assessment Task Three – Element 3

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### Introduction

This Task is designed to assess your ability to evaluate the reception area.

### Instructions

- Evaluate the effectiveness of your reception area. In particular analyse its effectiveness in the following area:
  - accessibility
  - functionality
  - environment
  - security and safety requirements
  - facilities for customers.
- Give a report on your evaluation to your assessor. Your report may be verbal or in writing. Regardless of the method used include a sketch of the area below.

### The evidence required for assessment task two will include:

- Written or oral evaluation.

## Assessment Guide

Use the table below to assess the learner's competence for unit standard 122. The Learning Assessment Guide for this unit also includes this Assessment Guide.

Task / Element	Evidence Required	Judgement
<p>Task 1 / Element 1</p> <p>This task involves the learner answering questions concerning the receptionist function.</p>	<p>The learner answers questions 1-7.</p> <p>The questions may be answered verbally or in writing.</p>	<p>The receptionist function is explained in terms of its role as an interface between the public/client and the organisation.</p> <p>Function may include at but is not limited to:</p> <ul style="list-style-type: none"> <li>• receiving visitors</li> <li>• Managing phone enquiries</li> <li>• ascertaining callers requirements and proving information and/or directing them</li> <li>• presenting a positive image</li> <li>• providing a high standard of customer service.</li> </ul> <p>At least three functions must be explained.</p>
	<p>Question 2</p>	<p>Key responsibilities are explained in terms of skills required.</p> <p>May include but not limited to:</p> <ul style="list-style-type: none"> <li>• receiving callers and processing enquiries</li> <li>• screening callers</li> <li>• making appointments</li> <li>• managing phone systems</li> <li>• keeping telecommunication records</li> <li>• providing information</li> <li>• routine clerical and wp duties</li> <li>• maintaining the reception area.</li> </ul> <p>At least four responsibilities required.</p>
	<p>Question 3</p>	<p>Organisational policies and procedures for client/business confidentiality and discretion are explained.</p>
	<p>Question 4</p>	<p>The significance of non-verbal communication is explained in terms of its impact on the receptionist's role.</p>

Task / Element	Evidence Required	Judgement
		<p>Types of non-verbal communication is required which may include but is not limited to:</p> <ul style="list-style-type: none"> <li>• body language</li> <li>• physical characteristics and appearance</li> <li>• facial expressions</li> <li>• gestures and body movements</li> <li>• posture</li> <li>• voice</li> <li>• space</li> <li>• physical environment</li> <li>• time.</li> </ul> <p>Evidence of four required.</p>
	Question 5	<p>The responsibilities of the receptionist in terms of understanding and promoting the organisation, its products and services, and client retention are explained.</p>
	Question 6	<p>The requirements for maintaining a safe and healthy environment in the reception are explained. Answer must include organisational policies, procedures and legislative requirements such as the Health and Safety Act.</p>
	Question 7	<p>The responsibilities of the receptionist in handling emergencies and crises in the reception area are explained in accordance with the organisation's policies and procedures.</p> <p>May include but not limited to:</p> <ul style="list-style-type: none"> <li>• emergency procedures for fire, earthquake, hold-up, bomb scare</li> <li>• contact information for emergency services and safety officer</li> <li>• contact information and procedures for medical and first aid emergencies</li> </ul> <p>Evidence of three is required.</p>

Task / Element	Evidence Required	Judgement
<p>Task 1 / Element 2</p> <p>This task involves the learner answering a question about clients with specific needs and is observed dealing with clients with specific needs if possible.</p>	<p>The learner answers question 8.</p> <p>The questions may be answered verbally or in writing.</p> <p>Learner is observed demonstrating their ability to deal with clients with specific needs as part of the receptionist role.</p>	<p>Learner demonstrates knowledge of techniques for assisting both internal and external clients with specific needs in line with the organisation's policies and procedures. Specific needs may include but are not limited to cultural sensitivity, language interpretation, physical disabilities. Evidence of two specific needs situations are required.</p> <p>For example, if language is a barrier it may help to know who speaks other languages within the organization and can interpret. Communication skills such as speaking clearly, not using slang or jargon, and paraphrasing may also be useful. If the person has a hearing disability, you could communicate in writing or if they can lip-read speak clearly and ensure they can see your mouth.</p>
<p>Task 2 / Element 2</p> <p>This task involves the learner being observed providing reception services.</p>	<p>The learner is observed performing reception duties and the Observation Form is completed by the observer.</p> <p>If the observer is not the assessor the Verification Form is signed by management.</p> <p>The verification confirms the ability of the learner to provide reception services to the standard required by the organisation.</p>	<p>Office facilities and systems are used to record appointments, managing diaries and maintaining reception records in accordance with the procedures and policies of the organisation.</p> <p>Learner prioritises and processes requests for information in accordance with the procedures and policies of the organisation.</p> <p>Requests may include but are not limited to:</p> <ul style="list-style-type: none"> <li>• mission statement</li> <li>• corporate plan</li> <li>• annual reports</li> <li>• management and admin policies</li> <li>• staff information</li> <li>• inter-company and organisation connections</li> <li>• product and service information</li> <li>• client information.</li> </ul> <p>Evidence of four is required.</p>

Task / Element	Evidence Required	Judgement
		<p>At least four aspects of the business telephone system are operated in accordance with organisational policies and procedures. Aspects may include but are not limited to:</p> <ul style="list-style-type: none"> <li>• receiving and redirecting telephone calls</li> <li>• placing calls</li> <li>• operating voice mail systems</li> <li>• taking messages</li> <li>• operating pagers, fax, and answering machines</li> <li>• maintaining telecommunications records</li> </ul> <hr/> <p>Communication, interpersonal and time management skills are demonstrated with internal and external clients and in accordance with the procedures and policies of the organisation. This may include but is not limited to:</p> <ul style="list-style-type: none"> <li>• receiving people</li> <li>• greeting appropriately</li> <li>• welcoming enquiries</li> <li>• ascertaining requirements</li> <li>• providing assistance</li> <li>• receiving and relaying messages promptly</li> <li>• assuring confidentiality</li> <li>• treating people and information with respect</li> <li>• resolving conflicts</li> <li>• managing stress</li> <li>• working within a team</li> <li>• using listening skills</li> <li>• prioritising.</li> </ul> <p>Evidence of four is required.</p> <hr/> <p>Learner demonstrates positive and suitable non-verbal communication skills when interacting with internal and external clients. Skills may include but not limited to:</p> <ul style="list-style-type: none"> <li>• body language</li> <li>• personal presentation</li> <li>• facial expressions</li> <li>• gestures and body movements</li> <li>• posture.</li> </ul>

Task / Element	Evidence Required	Judgement
<p>Task 2 / Element 3</p> <p>The learner maintains the reception area.</p>	<p>Learner is observed maintaining the reception area and the observation form is completed.</p> <p>If the observer is not the assessor the Verification Form is signed by management.</p>	<p>The learner implements procedures for maintaining an effective reception area in accordance with the procedures and policies of the organisation.</p>
<p>Task 3 / Element 3</p> <p>This task involves the learner evaluating their reception area.</p>	<p>The learner evaluates the layout of the reception area and its organisation during discussion with the assessor or in writing. A sketch of the area is included.</p>	<p>The evaluation is performed in terms of the accessibility, functionality, environment, security and safety requirements, and facilities for customers.</p>