



Employer Task book Level 1 NVQ Business and Administration

Young Apprenticeship



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This work experience task book has been developed to assist you to plan, along with your young apprentice, their skills development in Business & Administration while spending time with your organisation.

You will see that each Section has a specific subject area, and that subject area is split into separate skills requirements. For example, we have a Section called Incoming Mail, which is divided into three skills requirements – receive, check and register incoming mail; sort incoming mail and distribute incoming mail. Each of these skills requirements is then divided into various activities. On completion of these activities the student will have developed the necessary skills for that particular section, and also produced sufficient evidence towards achievement of Business & Administration NVQ level 1.

In the index you will see the number of activities indicated against each section. To allow maximum flexibility in the planning of work activities for the young apprentice, some of these activities are designed to take a very short period to achieve, while others will be dependent both on the level of involvement the young apprentice has in the working environment, and the amount of time available. An approximate time required for the completion of each of these activities is indicated in the index.

There is also a spread of activities across all of the optional units for level 1 NVQ, each naturally building into the requirements of the core units. A young apprentice who completes all the activities in this task book will not only have achieved more than the requirement for the level 1 NVQ, but will have developed a very wide range of knowledge and experience in the world of Business & Administration.

Your young apprentice should be guided to complete each activity in order of printing but the choice and order of sections is, of course, based on availability of tasks and supervision.

You will also see provided on page 3, a list of suggested project led tasks which you may wish to plan to use with your young apprentice. These project led tasks are designed to incorporate aspects of several units from Business & Administration level 1. The project led tasks will encourage the young apprentice to work through the 4 stages of enterprise to produce their final product, i.e. 1, tackling a problem or need; 2, planning the project or activity; 3, implementing the plan; 4, evaluating the processes.

It is also suggested that the Personal Development Plan provided in page 2 be completed with the young apprentice at commencement of their time with your organisation and reviewed on completion.

Suggested project led tasks		Date planned	Date completed
1	Conduct health and safety risk assessments for a department within the organisation, producing a report for the department supervisor		
1	Arrange an internal meeting incorporating a number of different departments, to discuss health and safety risk assessment findings. Prepare an agenda and compile minutes of the meeting for circulation.		
2	Produce a brochure or publication to meet an identified internal or external need.		
3	Produce a maintenance log book for all office equipment to include the correct contact details for each item		
4	Produce/up date internal telephone (extension numbers) list for all staff members, and distribute the agreed list to all staff		
5	Compile a short directory of all company relevant web-pages used by the staff, and distribute the list for staff information		

Completion of each of these project based tasks will enable the young apprentice to achieve a number of units from Business & Administration level 1. The assessment of the young apprentice's progress towards achievement of the project based task can be integrated into the activities contained in the task book.

Each of the Section lists all of the activities contained in each Section, with an approximate time required for completion. This time allocation should only be used as a general guide as completion of each activity is dependent on the complexity of the task and the skills and aptitude of the young apprentice. You will also see indicated the relevant unit(s) from the NVQ Business & Administration level 1 which will be met with the evidence provided from successful completion of the activities contained in each Section.

Although all the activities have been mapped against each of the relevant units, the assessor working with the young apprentice to achieve NVQ Business & Administration level 1 should refer to the CfA Assessment Guide issued May 2005 to ensure they are meeting all the necessary assessment criteria and are utilising all the real evidence produced in the most effective format.

Section 1: Welcoming Visitors

5 activities

Skill 1: Welcoming visitors

Approximate time only

Activity 1	1 hour
Activity 2	1 hour
Activity 3	1 hour
Activity 4	1 hour
Activity 5: Observed Activity	3.5 hours

On completion of all skills and all activities in section 1, the young apprentice will have gathered evidence through:

- portfolio building,
- observation
- witness testimonies (where appropriate)

for the following units:

Completed Unit

Unit 103 - Welcome visitors

The evidence generated from Section 1 skills and activities may also contribute to the following units

Unit 105 - Store and retrieve information

Unit 108 - Make and receive telephone calls

Unit 110 - Ensure your own action reduce risks to health and safety

All evidence generated from Section 1 is holistically mapped to the mandatory units

Unit 101 - Carry out your responsibilities at work

Unit 102 - Work within your business environment

Section 2: Incoming Mail

14 activities

Skill 1: Receive, check and register incoming mail**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3	1 hour
Activity 4: Observed Activity	3 hours

Skill 2: Sort incoming mail**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3	1 hour
Activity 4 : Observed Activity	3 hours

Skill 3 : Distribute incoming mail**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3 : Observed Activity	2 hours

Section 2: Outgoing Mail

9 activities

Skill 1: Collect and check outgoing mail**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3 : Observed Activity	2 hours

Skill 2: Identify best options for despatching mail**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3: Observed Activity	2 hours

Skill 3: Frank or stamp and despatch outgoing mail**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3: Observed Activity	2 hours

On completion of all skills and all activities in section 2, the young apprentice will have gathered evidence through:

- portfolio building,
- observation
- witness testimonies (where appropriate)

for the following units:

Completed Unit

Unit 104 – Handle mail

The evidence generated from Section 2 skills and activities may also contribute to the following units

Unit 105 - Store and retrieve information

Unit 108 - Make and receive telephone calls

Unit 109 - Use office equipment

Unit 110 - Ensure your own action reduce risks to health and safety

All evidence generated from Section 2 is holistically mapped to the mandatory units

Unit 101 - Carry out your responsibilities at work

Unit 102 - Work within your business environment

Section 3: Filing Using Electronic Systems

12 activities

Skill 1: File Information**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3	1 hour
Activity 4: Observed Activity	3 hours

Skill 2: Update electronic information**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3: Observed Activity	2 hours

Skill 3: Retrieve electronic information**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3	1 hour
Activity 4	1 hour
Activity 5: Observed Activity	4 hours

On completion of all skills and all activities in section 3, the young apprentice will have gathered evidence through:

- portfolio building,
- observation
- witness testimonies (where appropriate)

for the following units:

Completed Unit

Unit 105 - Store and retrieve information

The evidence generated from Section 3 skills and activities may also contribute to the following units

Unit 107 – Use word processing software

Unit 110 - Ensure your own action reduce risks to health and safety

All evidence generated from Section 3 is holistically mapped to the mandatory units

Unit 101 - Carry out your responsibilities at work

Unit 102 - Work within your business environment

Section 4: Filing Using Manual Systems

14 activities

Skill 1: File Information

Activity 1	1 hour
Activity 2	1 hour
Activity 3	1 hour
Activity 4: Observed Activity	3 hours

Approximate time only

Skill 2: Update manual information

Activity 1	1 hour
Activity 2	1 hour
Activity 3	1 hour
Activity 4: Observed Activity	3 hours

Approximate time only

Skill 3: Retrieve manual information

Activity 1	1 hour
Activity 2	1 hour
Activity 3	1 hour
Activity 4	1 hour
Activity 5	1 hour
Activity 6: Observed Activity	5 hours

Approximate time only

On completion of all skills and all activities in section 4, the young apprentice will have gathered evidence through:

- portfolio building,
- observation
- witness testimonies (where appropriate)

for the following units:

Completed Unit

Unit 105 - Store and retrieve information

The evidence generated from Section 4 skills and activities may also contribute to the following units

Unit 107 – Use word processing software

Unit 110 - Ensure your own action reduce risks to health and safety

All evidence generated from Section 4 is holistically mapped to the mandatory units

Unit 101 - Carry out your responsibilities at work

Unit 102 - Work within your business environment

Section 5: Using IT to Exchange Information

21 activities

Skill : Sending emails**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3	1 hour
Activity 5	1 hour
Activity 6	1 hour
Activity 7	1 hour
Activity 8: Observed Activity	5 hours

Skill 2: Receiving emails**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3	1 hour
Activity 5	1 hour
Activity 6	1 hour
Activity 7: Observed Activity	5 hours

Skill 3: Search for information on the internet**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3	1 hour
Activity 5	1 hour
Activity 6	1 hour
Activity 7: Observed Activity	5 hour

On completion of all skills and all activities in section 5, the young apprentice will have gathered evidence through:

- portfolio building,
- observation
- witness testimonies (where appropriate)

for the following units:

Completed Unit

Unit 106 - Store and retrieve information

The evidence generated from Section 5 skills and activities may also contribute to the following units

Unit 107 – Use word processing software

Unit 110 - Ensure your own action reduce risks to health and safety

All evidence generated from Section 5 is holistically mapped to the mandatory units

Unit 101 - Carry out your responsibilities at work

Unit 102 - Work within your business environment

Section 6: Using Word Processing Software

16 activities

Skill 1: Handling files

Activity 1
Activity 2
Activity 3
Activity 4
Activity 5
Activity 6: Observed Activity

Approximate time only

1 hour
1 hour
1 hour
1 hour
1 hour
5 hours

Skill 2: Combine information

Activity 1
Activity 2
Activity 3: Observed Activity

Approximate time only

1 hour
1 hour
2 hours

Skill 3: Enter and edit text

Activity 1
Activity 2
Activity 3: Observed Activity

Approximate time only

30 minutes
30 minutes
1 hour

Skill 4: Format text

Activity 1
Activity 2: Observed Activity

Approximate time only

30 minutes
30 minutes

Skill 5: Check text

Activity 1
Activity 2: Observed Activity

Approximate time only

30 minutes
30 minutes

On completion of all skills and all activities in section 6, the young apprentice will have gathered evidence through:

- portfolio building,
- observation
- witness testimonies (where appropriate)

for the following units:

Completed Unit

Unit 107 – Use word processing software

The evidence generated from Section 6 skills and activities may also contribute to the following units

Unit 105 - Store and retrieve information

Unit 109 - Use office equipment

Unit 110 - Ensure your own action reduce risks to health and safety

All evidence generated from Section 6 is holistically mapped to the mandatory units

Unit 101 - Carry out your responsibilities at work

Unit 102 - Work within your business environment

Section 7: Making and Receiving Telephone Calls

14 activities

Skill 1: Making telephone calls**Approximate time only**

Activity 1	30 minutes
Activity 2	30 minutes
Activity 3	30 minutes
Activity 5	30 minutes
Activity 6	30 minutes
Activity 7: Observed Activity	2.5 hours

Skill 2: Receiving and transferring telephone calls**Approximate time only**

Activity 1	30 minutes
Activity 2	30 minutes
Activity 3	30 minutes
Activity 5	30 minutes
Activity 6	30 minutes
Activity 7: Observed Activity	3 hours

On completion of all skills and all activities in section 7, the young apprentice will have gathered evidence through:

- portfolio building,
- observation
- witness testimonies (where appropriate)

for the following units:

Completed Unit

Unit 108 – Make and receive telephone calls

The evidence generated from Section 7 skills and activities may also contribute to the following units

Unit 109 - Use office equipment

Unit 110 - Ensure your own action reduce risks to health and safety

All evidence generated from Section 7 is holistically mapped to the mandatory units

Unit 101 - Carry out your responsibilities at work

Unit 102 - Work within your business environment

Section 8: Using Office Equipment

14 activities

Skill 1: Prepare and use a variety of office equipment**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3	1 hour
Activity 4	1 hour
Activity 5: Observed Activity	3 hours

Skill 2: Use the equipment to produce work**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3	1 hour
Activity 4	1 hour
Activity 5: Observed Activity	3 hours

Skill 3: Ensure the equipment is ready for the next user**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3	1 hour
Activity 4: Observed Activity	2 hours

On completion of all skills and all activities in section 8, the young apprentice will have gathered evidence through:

- portfolio building,
- observation
- witness testimonies (where appropriate)

for the following units:

Completed Unit

Unit 109 – Use office equipment

The evidence generated from Section 8 skills and activities may also contribute to the following units

Unit 108 – Make and receive telephone calls

Unit 110 - Ensure your own action reduce risks to health and safety

All evidence generated from Section 8 is holistically mapped to the mandatory units

Unit 101 - Carry out your responsibilities at work

Unit 102 - Work within your business environment

Section 9: Working Safely

13 activities

Skill 1: Identify hazards**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3	1 hour
Activity 4	1 hour
Activity 5	1 hour
Activity 6: Observed activity	4 hours

Skill 2: Evaluate risks**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3 : Observed Activity	2 hours

Skill 3: Take actions to reduce risks**Approximate time only**

Activity 1	1 hour
Activity 2	1 hour
Activity 3	1 hour
Activity 4: Observed Activity	3 hours

On completion of all skills and all activities in section 9, the young apprentice will have gathered evidence through:

- portfolio building,
- observation
- witness testimonies (where appropriate)

for the following units:

Completed Unit

Unit 110 - Ensure your own action reduce risks to health and safety

All evidence generated from Section 9 is holistically mapped to the mandatory units

Unit 101 - Carry out your responsibilities at work

Unit 102 - Work within your business environment

SECTION I WELCOMING VISITORS

SKILL I Receive visitors and meet their needs

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for receiving visitors in a professional manner and meeting their needs.	
<i>The activities will involve</i>	<i>✓ when completed</i>
• Interpersonal skills	
• Presenting yourself	
• Questioning	
• Listening	
• Communicating	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
I	Welcome visitors and make sure their needs are met

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1. Company procedures for dealing with visitors	
2. Security information relating to visitors to the organisation	

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1. Carry out the tasks associated with dealing with visitors and meeting their needs.	
2. Gather and collate examples of how they have carried out the required activities	
3. Be observed by an experienced member of staff carrying out the required tasks	
4. Answer questions relating to carrying out the required tasks	

ACTIVITY ONE

- 1.1.1 Gather information on the organisations procedures for dealing with visitors. This may include registering visitors with visitor's badges etc.

Date completed:

Confirmed:

ACTIVITY TWO

- 1.1.2 Explain the types of visitors the organisation has, how visitors should be greeted and the actions you should take when they arrive.

Date completed:

Confirmed:

ACTIVITY THREE

- 1.1.3 What are the most important things you should do when meeting a visitor and why?

Date completed:

Confirmed:

OBSERVATION/WITNESS TESTIMONY CHECKLIST**WELCOMING VISITORS**

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Young apprentice greeted visitors in a positive and professional manner				
Young apprentice followed the company procedure for recording visitors details				
Young apprentice identified the reason for the visit and dealt with this effectively				
Where a visitor required to meet with a member of staff, the young apprentice informed them efficiently				
While the visitor was waiting for the arrival of the member of staff the young apprentice dealt with him/her in a professional manner				
Young apprentice dealt with the visitor in accordance with organisations health and safety procedures and other guidelines				

Supervisor/Assessor signature: _____ Date: _____

SECTION 2 INCOMING MAIL

SKILL I Receive, check and register incoming mail

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for receiving, checking and registering incoming mail .	
<i>The activities will involve</i>	<i>✓ when completed</i>
• collating information	
• using office machinery (where necessary)	
• communicating with others	
• reading	
• checking	
• sorting	
• recording	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Receive, check and register incoming mail
2	Sort incoming mail
3	Distribute incoming mail

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1. Company procedures/policies for handling incoming and internal mail	
2. Instruction on the correct use of required equipment , such as:	
• Sorting Tables	
• Letter opening machines	
• Delivery trolleys	
• Photocopier machines	
3. The structure of the company and/or departments	
4. The names and titles of company employees	
5. The roles and responsibilities of individuals and teams	
6. The correct methods for recording incoming mail	

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1. Carry out the tasks associated with processing the incoming mail	
2. Gather and collate examples of how they have carried out the required tasks	
3. Be observed by an experienced member of staff carrying out the required tasks	
4. Answer questions relating to carrying out the required tasks	

ACTIVITY ONE

2.1.1. Investigate and gather information on how incoming mail is received to the company, listing in the space indicated below, all the information you have gathered, including the different postal/courier services and internal mail distribution methods used.

Typical information examples might be:

- Incoming mail log
- Courier delivery notes
- Remittance notes

Date completed:

Confirmed:

GIVE DETAILS OF THE INFORMATION YOU HAVE GATHERED

Date completed:

Confirmed:

ACTIVITY TWO

2.1.2 Using the information you have gathered, indicate how incoming mail is received:

- Direct from the postal service
- Courier service
- From another member of staff or department

Date completed:

Confirmed:

ACTIVITY THREE

2.1.3 Investigate, gather information on company procedures etc., and explain below on how you would check all incoming mail and how you would deal with the following:

- Damaged items

- Suspicious items

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered, mark all your information as 'Incoming mail – Activity 2.1.1, 2.1.2 and 2.1.3 and put it in your portfolio. Ask your supervisor to arrange for you to receive and check the incoming mail and to complete the observation checklist for **receiving, checking and registering incoming mail**.

OBSERVATION/WITNESS TESTIMONY CHECKLIST

RECEIVING, CHECKING AND REGISTER INCOMING MAIL

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Handled incoming mail as per polices or procedures				
Dealt with post direct from the postal service				
Dealt with post from a courier service				
Handled internal mail from another member of staff or department				
Explained or dealt with as per procedures/policies on damaged or suspicious items				
Explained or dealt with as per procedures/policies for safe use of office machinery				

If during the observation period the young apprentice did not deal with any areas listed, the following questions should be asked to ensure the young apprentice has investigated the procedures and understands the process.

- If no suspicious or damaged items are received, what are the procedures for handling such item?

Supervisor/Assessor signature: _____ **Date:** _____

SECTION 2 INCOMING MAIL

SKILL 2 Sorting incoming mail

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for receiving, checking and registering incoming mail .	
The activities will involve:	✓ when completed
• collating information	
• using office machinery (where necessary)	
• communicating with others	
• reading	
• checking	
• sorting	
• recording	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Receive, check and register incoming mail
2	Sort incoming mail
3	Distribute incoming mail

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	✓ when completed
1.	Company procedures/policies for handling incoming and internal mail
2.	Instruction on the correct use of required equipment , such as:
	• Sorting Tables
	• Letter opening machines
	• Delivery trolleys
	• Photocopier machines
3.	The structure of the company and/or departments
4.	The names and titles of company employees
5.	The roles and responsibilities of individuals and teams
6.	The correct methods for recording incoming mail

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	✓ when completed
1.	Carry out the tasks associated with processing the incoming mail
2.	Gather and collate examples of how they have carried out the required tasks
3.	Be observed by an experienced member of staff carrying out the required tasks
4.	Answer questions relating to carrying out the required tasks

- Mail with enclosures

Date completed:

Confirmed:

ACTIVITY THREE

2.2.3 Investigate, gather information and explain how you would deal with the following:

- Envelopes marked 'Private', 'Confidential' or both

- Enclosures received in the post

- The importance of ensuring you comply with the security procedure

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered (mark all your information as 'Incoming Mail – Activity 2.2.1, 2.2.2, and 2.2.3, and put it in your portfolio) then ask your supervisor to arrange for you to sort the incoming mail and to complete the observation checklist for **sorting mail**

OBSERVATION/WITNESS TESTIMONY CHECKLIST

SORTING INCOMING MAIL

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Sorted incoming mail for different departments				
Sorted all mail marked 'Private' 'Confidential' or 'Personal'				
Date stamped incoming mail				
Dealt with any equipment used in sorting incoming mail as per procedures for the safe use of office machinery				
Sorted all incoming mail in accordance with the company security procedures				

If, during the observation period the young apprentice did not deal with any areas listed below, the following questions should be asked to ensure the young apprentice has investigated the procedures and understands the process.

- If no 'Private' 'Confidential' or 'Personal' items were handled, what are the procedures for sorting these items?

- If the incoming mail has any enclosures, what are the procedures for handling these?

Supervisor/Assessor signature: _____ **Date:** _____

SECTION 2 INCOMING MAIL

SKILL 3 Distributing incoming mail

This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for **receiving, checking and registering incoming mail**.

The activities will involve:		✓ when completed
• collating information		
• using office machinery (where necessary)		
• communicating with others		
• reading		
• checking		
• sorting		
• recording		

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION

1	Receive, check and register incoming mail
2	Sort incoming mail
3	Distribute incoming mail

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW

		✓ when completed
1.	Company procedures/policies for handling incoming and internal mail	
2.	Instruction on the correct use of required equipment , such as:	
	• Sorting Tables	
	• Letter opening machines	
	• Delivery trolleys	
	• Photocopier machines	
3.	The structure of the company and/or departments	
4.	The names and titles of company employees	
5.	The roles and responsibilities of individuals and teams	
6.	The correct methods for recording incoming mail	

WHAT THE YOUNG APPRENTICE NEEDS TO DO

		✓ when completed
1.	Carry out the tasks associated with processing the incoming mail	
2.	Gather and collate examples of how they have carried out the required tasks	
3.	Be observed by an experienced member of staff carrying out the required tasks	
4.	Answer questions relating to carrying out the required tasks	

ACTIVITY ONE

2.3.1 Investigate and gather information on how you would distribute incoming mail within the company, explaining in the space indicated below, all the information you have gathered.

Date completed:

Confirmed:

GIVE DETAILS OF THE INFORMATION YOU HAVE GATHERED

Date completed:

Confirmed:

ACTIVITY TWO

2.3.2 Using the information you have gathered, indicate how you distributed the mail in accordance with the company procedure

- For different departments
- Private, Confidential or Personal
- Mail with enclosures

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered (mark all your information as 'Incoming Mail – Activity 2.3.1 and 2.3.2, and save it in your portfolio) then ask you supervisor to arrange for you to distribute the incoming mail and to complete the observation checklist for ***distributing mail***

OBSERVATION/WITNESS TESTIMONY CHECKLIST

DISTRIBUTING INCOMING MAIL

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Distributing incoming mail to different departments				
Distributed all mail marked 'Private' 'Confidential' or 'Personal'				
Distributed incoming mail as per company procedures for mail with enclosures				
Explained or dealt with as per procedures/policies safe use of office machinery				

If during the observation period the young apprentice did not deal with any areas listed below, the following questions should be asked to ensure the young apprentice has investigated the procedures and understands the process.

- If no 'Private' 'Confidential' or 'Personal' items were to be distributed, what are the procedures for sorting these items?

- If the incoming mail has any enclosures, what would be the procedures for distributing these?

Supervisor/Assessor signature: _____ **Date:** _____

SECTION 2 OUTGOING MAIL

SKILL 4 Collect and check outgoing mail

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for handling collecting, and checking outgoing mail	
<i>The activities will involve:</i>	<i>✓ when completed</i>
• collating information	
• using office machinery (where necessary)	
• communicating with others	
• prioritising	
• checking	
• decision-making	
• recording	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
4	Collect and check outgoing mail
5	Identify best options for despatching mail
6	Frank or stamp and despatch outgoing mail

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1. Company procedures/policies for outgoing mail	
2. Correct use of equipment , such as:	
Franking machines	Photocopier machines
Letter scales	Folding and inserting machines
Parcel scales	Addressing systems
3. The structure of the company and/or departments	
4. The names and titles of company employees	
5. The roles and responsibilities of individuals and teams	
6. Correct methods for recording outgoing mail	

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1. Carry out the tasks associated with processing the outgoing mail	
2. Gather and collate examples of how they have carried out the required tasks	
3. Be observed by an experienced member of staff carrying out the required tasks	
4. Answer questions relating to carrying out the required tasks	

ACTIVITY TWO

2.4.2 Using the information you have gathered, explain how you check the outgoing mail to ensure that the:

- Post contains the correct contents

- Name, address and post code are correct

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered (mark all your information as 'outgoing mail – Activity 2.4.1 and 2.4.2, save it in your portfolio) then ask your supervisor to allow you to collect and check outgoing mail and complete the observation checklist for ***collecting and checking out going mail***

OBSERVATION/WITNESS TESTIMONY CHECKLIST

COLLECTING AND CHECKING ALL OUT GOING MAIL

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Young apprentice collecting out going mail to meet all postal services deadline				
Post contained correct enclosures				
Name, address and post code was correct on all out going mail				
Explained or dealt with as per procedures/policies safe use of office machinery				

If during the observation period the young apprentice did not deal with any areas listed below, the following questions should be asked to ensure the young apprentice has investigated the procedures and understands the process.

- If name, address or post code was incorrect – what would you do?

- If the enclosures within the outgoing mail were incorrect or missing, what would you do?

Supervisor/Assessor signature: _____ **Date:** _____

SECTION 2 OUTGOING MAIL

SKILL 5 Identify best options for despatching mail

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for handling collecting, and checking outgoing mail	
<i>The activities will involve:</i>	<i>✓ when completed</i>
• collating information	
• using office machinery (where necessary)	
• communicating with others	
• prioritising	
• checking	
• decision-making	
• recording	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
4	Collect and check outgoing mail
5	Identify best options for despatching mail
6	Frank or stamp and despatch outgoing mail

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1. Company procedures/policies for outgoing mail	
2. Correct use of equipment , such as:	
Franking machines	Photocopier machines
Letter scales	Folding and inserting machines
Parcel scales	Addressing systems
3. The structure of the company and/or departments	
4. The names and titles of company employees	
5. The roles and responsibilities of individuals and teams	
6. Correct methods for recording outgoing mail	

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1. Carry out the tasks associated with processing the outgoing mail	
2. Gather and collate examples of how they have carried out the required tasks	
3. Be observed by an experienced member of staff carrying out the required tasks	
4. Answer questions relating to carrying out the required tasks	

ACTIVITY TWO

2.5.2 Using the information you have gathered, explain how you check the outgoing mail to ensure:

Correct postal rates are applied

Correct courier service is used

Urgent delivery is dealt with properly

Special delivery is dealt with properly

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered (mark all your information as 'Incoming Mail – Activity 2.5.1, 2.5.2, save it in your portfolio) then ask your supervisor to arrange for you to deal with despatching the mail and to complete the observation checklist for ***Identifying best options for despatching mail***

OBSERVATION/WITNESS TESTIMONY CHECKLIST

DESPATCHING OUT GOING MAIL

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Young apprentice identified the best options for despatching out going mail				
Young apprentice identified the best postal service and rates				
Young apprentice processed urgent mail for despatching				
Young apprentice processed special delivery mail for despatching				
Explained or dealt with as per procedures/policies safe use of office machinery				

If during the observation period the young apprentice did not deal with any areas listed below, the following questions should be asked to ensure the young apprentice has investigated the procedures and understands the process.

- If there were not urgent or special delivery requirements for despatching – what would you do?

Supervisor/Assessor signature: _____ **Date:** _____

SECTION 2 OUTGOING MAIL

SKILL 6 Frank or stamp and despatch outgoing mail

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for handling collecting, and checking outgoing mail	
<i>The activities will involve:</i>	<i>✓ when completed</i>
• collating information	
• using office machinery (where necessary)	
• communicating with others	
• prioritising	
• checking	
• decision-making	
• recording	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
4	Collect and check outgoing mail
5	Identify best options for despatching mail
6	Frank or stamp and despatch outgoing mail

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1. Company procedures/policies for outgoing mail	
2. Correct use of equipment , such as:	
Franking machines	Photocopier machines
Letter scales	Folding and inserting machines
Parcel scales	Addressing systems
3. The structure of the company and/or departments	
4. The names and titles of company employees	
5. The roles and responsibilities of individuals and teams	
6. Correct methods for recording outgoing mail	

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1. Carry out the tasks associated with processing the outgoing mail	
2. Gather and collate examples of how they have carried out the required tasks	
3. Be observed by an experienced member of staff carrying out the required tasks	
4. Answer questions relating to carrying out the required tasks	

ACTIVITY ONE

2.6.1 Investigate, gather information and explain in the space indicated below how you would ensure you have set up the franking machine to display the correct postage amount and correct posting date.

Typical information might be:

- Postal service rates
- Manufacturers instructions for weighing scales
- Manufacturers instructions for franking machine

Date completed:

GIVE DETAILS OF THE INFORMATION YOU HAVE GATHERED

Date completed:

Confirmed:

ACTIVITY TWO

2.6.2 Using the information you have gathered, explain how you check the outgoing mail to ensure that the:

Correct item has been weighed correctly

The franking machine is working correctly

Correct postage usage has been logged

Payment details for urgent or special delivery have been recorded

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered (mark all your information as 'Incoming Mail – Activity 2.6.1 and 2.6.2 save it in your portfolio) then ask your supervisor to arrange for you to deal with franking, stamping and despatching the outgoing mail and to complete the observation checklist for ***franking or stamping and despatching out going mail***

OBSERVATION/WITNESS TESTIMONY CHECKLIST

FRANK OR STAMP AND DISPATCH OUTGOING MAIL

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Young apprentice set up franking machine to show correct postage amount and correct date				
Young apprentice identified the correct weight for out going post				
Young apprentice's logged postage stamps usage (if applicable)				
Young apprentice logged correct details for cost of urgent or special delivery (if applicable)				
Explained or dealt with as per procedures/policies safe use of office machinery				

If during the observation period the young apprentice did not deal with any areas listed below, the following questions should be asked to ensure the young apprentice has investigated the procedures and understands the process.

- If there were no urgent or special deliveries for processing, what would you do if there were urgent or special requirements

Supervisor/Assessor signature: _____ **Date:** _____

SECTION 3 STORE INFORMATION ELECTRONICALLY

SKILL I File Information

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for storing electronic information .	
The activities will involve: (✓ when completed)	
• Planning	
• Organising	
• Reading	
• Writing	
• Using numbers	
• Communicating	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	File information
2	Update information
3	Retrieve information

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	✓ when completed
1.	The company procedures/policies for storing information
2.	The correct use of required equipment , such as
	• Computer
	• Work station

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	✓ when completed
1.	Carry out the activities associated with storing information electronically
2.	Gather and collate examples of how they have carried out the required activities
3.	Be observed by an experienced member of staff carrying out the required tasks
4.	Answer questions relating to carrying out the required tasks

ACTIVITY ONE

3.1.1. Investigate, gather information and explain how you would ensure the correct procedure for storing electronic information

Typical examples of evidence could be:

- File lists
- Procedures for the type of filing system you used
- Different electronic systems within the company for stored information
- Company requirement for compiling with the Data Protection Act and any other current legislation
- Health and Safety at Work Act
- Display Screen Equipment Act

Date completed:

Confirmed:

GIVE DETAILS OF THE INFORMATION YOU HAVE GATHERED

Date completed:

Confirmed:

ACTIVITY TWO

3.1.2 How do you make sure that the electronic information you are storing is kept safe and confidential

Date completed:

Confirmed:

ACTIVITY THREE

3.1.3 Explain why it is important to store electronic information efficiently and securely

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered, mark all your information as 'Store electronic information' – Activity 3.1.1, 3.1.2, and 3.1.3 and put it in your portfolio. Ask your supervisor to arrange for you to store electronic information within each of the company computer systems and complete an observation checklist for **storing electronic information** for each observed activity,

OBSERVATION/WITNESS TESTIMONY CHECKLIST**STORING INFORMATION**

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Young apprentice used the correct procedure for storing electronic information				
Young apprentice stored electronic information in a safe and confidential manner				
Young apprentice stored electronic information effectively and efficiently				
Young apprentice was aware of the health and safety/VDU regulations and Data Protection Act				
Young apprentice used safe working practices when handling machinery (if applicable)				

Supervisor/Assessor signature: _____ Date: _____

SECTION 3 STORE INFORMATION ELECTRONICALLY

SKILL 2 Update Electronic Information

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for updating electronic information .	
The activities will involve: (✓ when completed)	
• Planning	
• Organising	
• Reading	
• Writing	
• Using numbers	
• Communicating	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	File information
2	Update information
3	Retrieve information

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	✓ when completed
1.	The company procedures/policies for storing information
2.	The correct use of required equipment , such as
	• Computer
	• Work station

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	✓ when completed
1.	Carry out the activities associated with storing information electronically
2.	Gather and collate examples of how they have carried out the required activities
3.	Be observed by an experienced member of staff carrying out the required tasks
4.	Answer questions relating to carrying out the required tasks

OBSERVATION/WITNESS TESTIMONY CHECKLIST
UPDATING ELECTRONIC INFORMATION

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Young apprentice used the correct procedure for updating electronic information				
Young apprentice updated electronic information in a safe and confidential manner				
Young apprentice updated electronic information effectively and efficiently				
Young apprentice was aware of the health and safety/VDU regulations and Data Protection Act				
Young apprentice used safe working practices when handling machinery (if applicable)				

If during the observation period the young apprentice did not deal with any areas listed, the following questions should be asked to ensure the young apprentice has investigated the procedures and understands the process.

- If there were no electronic files to update, ask the young apprentice to explain this procedure

Supervisor/Assessor signature: _____ **Date:** _____

SECTION 3

STORE INFORMATION ELECTRONICALLY

SKILL 3

Retrieve Electronic information

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for retrieving electronic information .	
The activities will involve: (✓ when completed)	
• Planning	
• Organising	
• Reading	
• Writing	
• Using numbers	
• Communicating	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	File information
2	Update information
3	Retrieve information

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	✓ when completed
1	Carry out the activities associated with retrieving electronic information
2	Gather and collate examples of how they have carried out the required tasks
3	Be observed by an experienced member of staff carrying out the required tasks
4	Answer questions relating to carrying out the required tasks

ACTIVITY FIVE

- 3.3.5** Explain the actions you would take to ensure you were retrieving electronic information while complying with Data Protection Act

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered, mark all your information as 'Store electronic information' – Activity 3.3.1, 3.3.2, 3.3.3, 3.3.4, and 3.3.5 put it in your portfolio. Ask your supervisor to arrange for you to retrieve electronic information from each of the company computer systems and to complete an observation checklist for **retrieving electronic information** for each of the observed activities

OBSERVATION/WITNESS TESTIMONY CHECKLIST

RETRIEVE ELECTRONIC INFORMATION

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Young apprentice used the correct procedure for retrieving information				
Young apprentice retrieved information in a safe and confidential manner				
Young apprentice retrieved information effectively and efficiently				
Young apprentice ensured the retrieved information was accurate and transferred to an approved location				
Young apprentice was aware of the health and safety/VDU regulations and Data Protection Act				
Young apprentice used safe working practices when handling machinery (if applicable)				

If during the observation period the young apprentice did not deal with any areas listed, the following questions should be asked to ensure the young apprentice has investigated the procedures and understands the process.

- If there were no problems when retrieving electronic information, ask the young apprentice to explain this procedure for missing files, damaged files and/or electronic file system failure

Supervisor/Assessor signature: _____ **Date:** _____

SECTION 4 STORE INFORMATION MANUALLY

SKILL 1 File Information

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for storing information manually .	
The activities will involve: (✓ when completed)	
• Planning	
• Organising	
• Reading	
• Writing	
• Using numbers	
• Communicating	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	File information
2	Update information
3	Retrieve information

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	✓ when completed
1.	The company procedures/policies for storing information
2.	The correct use of required equipment , such as
	• Photocopier
	• Labelling machine

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	✓ when completed
1.	Carry out the tasks associated with storing information manually
2.	Gather and collate examples of how they have carried out the required activities
3.	Be observed by an experienced member of staff carrying out the required tasks
4.	Answer questions relating to carrying out the required tasks

ACTIVITY THREE

4.1.3 Explain why it is important to store information effectively and efficiently

Date completed:

Confirmed:

ACTIVITY FOUR

4.1.4 Explain the actions you would take to ensure you were filing information manually while complying with the requirements of the Data Protection Act.

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered, mark all your information as 'Store information manually' – Activity 4.1.1, 4.1.2, 4.1.3 and 4.1.4 and put it in your portfolio. Ask your supervisor to arrange for you to carry out filing within all the company's manual filing systems, in accordance with the company procedures, and to complete an observation checklist for **storing information manually** for each observed activity.

OBSERVATION/WITNESS TESTIMONY CHECKLIST

STORING INFORMATION MANUALLY

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Young apprentice used the correct procedure for storing information				
Young apprentice stored information in a safe and confidential manner				
Young apprentice stored information effectively and efficiently				
Young apprentice used safe working practices when handling machinery (if applicable)				
Young apprentice ensured the requirements of the Data Protection Act were complied with (where necessary)				

Supervisor/Assessor signature: _____ Date: _____

SECTION 4 STORE INFORMATION MANUALLY

SKILL 2 Update Information

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for update information	
The activities will involve: (✓ when completed)	
• Planning	
• Organising	
• Reading	
• Writing	
• Using numbers	
• Communicating	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	File information
2	Update information
3	Retrieve information

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	✓ when completed
1.	The company procedures/policies for storing information
2.	The correct use of required equipment , such as
	• Photocopier
	• Labelling machine

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	✓ when completed
1.	Carry out the tasks associated with storing information manually
2.	Gather and collate examples of how they have carried out the required activities
3.	Be observed by an experienced member of staff carrying out the required tasks
4.	Answer questions relating to carrying out the required tasks

ACTIVITY ONE

4.2.1 Investigate, gather information and explain in the section indicated below, how you would ensure the correct procedure for updating information as required

Typical examples of evidence could be:

- File lists
- Procedures for type of filing system you used
- Different systems within the company or updating manual information

Date completed:

Confirmed:

GIVE DETAILS OF THE INFORMATION YOU HAVE GATHERED

Date completed:

Confirmed:

ACTIVITY TWO

4.2.2 How do you make sure that the information you are updating is being stored accurately and in approved locations?

Date completed:

Confirmed:

ACTIVITY THREE

- 4.2.3 Explain the actions you would take to ensure you were updating information manually while complying with the requirements of the Data Protection Act.

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered, mark all your information as 'Store information' – Activity 4.2.1, 4.2.2 and 4.2.3 and put it in your portfolio. Ask your supervisor to arrange for you to update information within each of the company's manual filing systems, and to complete an observation checklist for **updating information manually** for each of the observed activities,

OBSERVATION CHECKLIST

UPDATING INFORMATION MANUALLY

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Young apprentice used the correct procedure for updating information				
Young apprentice updated information in a safe and confidential manner				
Young apprentice updated information effectively and efficiently				
Young apprentice used safe working practices when handling machinery (if applicable)				
Young apprentice ensured the requirements of the Data Protection Act were complied with (where necessary)				

If during the observation period the young apprentice did not deal with any areas listed, the following questions should be asked to ensure the young apprentice has investigated the procedures and understands the process.

- If there were no files to update, ask the young apprentice to explain this procedure

Supervisor/Assessor signature: _____ **Date:** _____

SECTION 4 STORE INFORMATION MANUALLY

SKILL 3 Retrieve information

WHAT IS INVOLVED?	
This activity will be carried out through a number of tasks which are designed to develop the young apprentice's skills for update information	
The tasks will involve: (✓ when completed)	
• Planning	
• Organising	
• Reading	
• Writing	
• Using numbers	
• Communicating	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	File information
2	Update information
3	Retrieve information

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	✓ when completed
1.	The company procedures/policies for storing information
2.	The correct use of required equipment , such as
	• Photocopier
	• Labelling machine

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	✓ when completed
1.	Carry out the tasks associated with storing information manually
2.	Gather and collate examples of how they have carried out the required activities
3.	Be observed by an experienced member of staff carrying out the required tasks
4.	Answer questions relating to carrying out the required tasks

OBSERVATION/WITNESS TESTIMONY CHECKLIST

RETRIEVE INFORMATION MANUALLY

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Young apprentice used the correct procedure for retrieving information				
Young apprentice retrieved information in a safe and confidential manner				
Young apprentice retrieved information effectively and efficiently				
Young apprentice ensured the retrieved information was accurate and transferred to an approved location				
Young apprentice used safe working practices when handling machinery (if applicable)				
Young apprentice ensured the requirements of the Data Protection Act were complied with (where necessary)				

If during the observation period the young apprentice did not deal with any areas listed, the following questions should be asked to ensure the young apprentice has investigated the procedures and understands the process.

- If there were no problems when retrieving information, ask the young apprentice to explain this procedure for missing files and or damaged files

Supervisor’/Assessor signature: _____ **Date:** _____

SECTION 5 USING IT TO EXCHANGE INFORMATION

SKILL I Sending Emails

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for sending emails	
<i>The activities will involve</i>	<i>✓ when completed</i>
• Planning	
• Organising	
• Communicating	
• Using technology	
• Reading	
• Writing	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Send Emails
2	Receive Emails
3	Search for information on the internet

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1. Company procedures/policies for use of computers, including:	
• Display Screen Regulations	
• Health & Safety Act	
• Data Protection Act	
• Equal Opportunities guidelines	
• Copyright guidelines set up by the organisation	
• Procedures in relation to computer virus protection	
• Other organisation specific procedures	
2. Instructions on the correct use of required equipment , such as:	
• Workstation	
• Computer	
• Keyboard	
• Computer Mouse	
• Monitor	

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1. Carry out the tasks associated with sending emails	
2. Gather and collate examples of how they have carried out the required activities	
3. Be observed by an experienced member of staff carrying out the required tasks	
4. Answer questions relating to carrying out the required tasks	

ACTIVITY ONE

5.1.1 Explain what emails are?

Date completed:

Confirmed:

ACTIVITY TWO

5.1.2 Explain what an email address book is and how would you use it?

Date completed:

Confirmed:

ACTIVITY THREE

5.1.3 Explain what a computer virus is and what can be done to protect from this?

Date completed:

Confirmed:

ACTIVITY FOUR

- 5.1.4 Investigate, gather information and explain the company policy and guidance issued to employees for sending emails

Date completed:

Confirmed:

Note: Copies of documents produced need only be printed off if this is required by the organisation, otherwise record where on the system they can be located

GIVE DETAILS OF THE INFORMATION YOU HAVE GATHERED

Date completed:

Confirmed:

ACTIVITY FIVE

- 5.1.5 Explain why some computer users may have difficulties in sending email

Date completed:

Confirmed:

ACTIVITY SIX

- 5.1.6 Investigate, gather information and explain legislation and company guidelines that affect the day to day use of Information Technology

Date completed:

Confirmed:

ACTIVITY SEVEN

- 5.1.7 Send various emails as listed below and provide copies

- An email to an individual Date sent:
- An email that has been carbon copied (cc) Date sent:
- An email with an attachment Date sent:
- Forwarded an email Date sent:
- Replied to an email Date sent:

Ask your supervisor to arrange for the Observation Checklist at the end of this section, to be completed .

Date completed:

Confirmed:

GIVE DETAILS OF THE E-MAILS YOU HAVE SENT

Date completed:

Confirmed:

Note: Copies of documents produced need only be printed off if this is required by the organisation, otherwise record where on the system they can be located

GIVE DETAILS OF THE INFORMATION YOU HAVE GATHERED

Date completed:	Confirmed:
------------------------	-------------------

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered, mark all your information as 'Sending emails – Activity 5.1.1, 5.1.2 5.1.3, 5.1.4, 5.1.5, 5.1.6 and 5.1.7 and put it in your portfolio. Ask your supervisor to arrange for you to complete an observation checklist for **sending emails** for each of the observed activities

OBSERVATION/WITNESS TESTIMONY CHECKLIST

SENDING EMAILS

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Handled word processing software in line with company procedures				
Young apprentice sent an email to an individual				
Young apprentice sent an email to an individual and carbon copied (cc) the email to another email address				
Young apprentice sent an email with an attachment				
Young apprentice forwarded on an email				
Young apprentice replied to an email				
Worked within safe working practices				
Operated office machinery safely and in line with company policies and procedures				

Supervisor/Assessor signature: _____ Date: _____

SECTION 5 USING IT TO EXCHANGE INFORMATION

SKILL 2 Receive Emails

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for receiving emails	
<i>The activities will involve</i>	<i>✓ when completed</i>
• Planning	
• Organising	
• Communicating	
• Using technology	
• Reading	
• Writing	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Send Emails
2	Receive Emails
3	Search for information on the internet

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1. Company procedures/policies for use of computers, including:	
• Display Screen Regulations	
• Health & Safety Act	
• Data Protection Act	
• Equal Opportunities guidelines	
• Copyright guidelines set up by the organisation	
• Procedures in relation to computer virus controls	
• Other organisation specific procedures	
2. Instructions on the correct use of required equipment , such as:	
• Workstation	
• Computer	
• Keyboard	
• Computer Mouse	
• Monitor	

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1. Carry out the tasks associated with receiving emails	
2. Gather and collate examples of how they have carried out the required activities	
3. Be observed by an experienced member of staff carrying out the required tasks	
4. Answer questions relating to carrying out the required tasks	

ACTIVITY ONE

5.2.1 Explain how you would receive an email?

Date completed:

Confirmed:

ACTIVITY TWO

5.2..2 Explain and demonstrate to your supervisor how you would know that a received email had an attachment

Date completed:

Confirmed:

ACTIVITY THREE

5.23 Explain the reason why it may be difficult for some computers to receive an email with attachments?

Date completed:

Confirmed

ACTIVITY FOUR

5.2.4 Explain procedures and polices on receiving emails from unknown users

Date completed:

Confirmed

OBSERVATION/WITNESS TESTIMONY CHECKLIST**RECEIVING EMAILS**

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Young apprentice followed company procedures/regulations when receiving an email from an individual				
Young apprentice followed company procedures/regulations when receiving an email which contained an attachment				
Worked within safe working practices				
Used office equipment safely in line with company procedures				

Supervisor/Assessor signature: _____ Date: _____

SECTION 5 USING IT TO EXCHANGE INFORMATION

SKILL 3 Search for Information on the Internet

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for searching information on the internet	
<i>The activities will involve</i>	<i>✓ when completed</i>
• Planning	
• Organising	
• Communicating	
• Using technology	
• Reading	
• Writing	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Send Emails
2	Receive Emails
3	Search for information on the internet

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1. Company procedures/policies for use of computers, including:	
• Display Screen Regulations	
• Health & Safety Act	
• Data Protection Act	
• Equal Opportunities guidelines	
• Copyright guidelines set up by the organisation	
• Procedures in relation to computer virus protection	
• Other organisation specific procedures	
2. Instructions on the correct use of required equipment , such as:	
• Workstation	
• Computer	
• Keyboard	
• Computer Mouse	
• Monitor	

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1. Carry out the tasks associated with searching for information on the internet	
2. Gather and collate examples of how they have carried out the required activities	
3. Be observed by an experienced member of staff carrying out the required tasks	
4. Answer questions relating to carrying out the required tasks	

ACTIVITY ONE

5.3.1 Explain the difference between internet and intranet

Date completed:

Confirmed:

ACTIVITY TWO

5.3.2 Explain where and when to seek advice for information from the internet or intranet

Date completed:

Confirmed:

ACTIVITY THREE

5.3.3 Explain what a search engine is, and how you would use it to find information

Date completed:

Confirmed

ACTIVITY FOUR

5.3.4 Explain what 'favourites' are in relation to searching the internet

Date completed:

Confirmed

OBSERVATION/WITNESS TESTIMONY CHECKLIST**RECEIVING EMAILS**

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Young apprentice followed company procedures/regulations when using the internet/intranet				
Young apprentice followed company procedures/regulations when emailing web pages and web link links to others				
Young apprentice located a search engine				
Young apprentice saved a website as a favourite				
Explained and dealt with each of the above as per procedures/policies for safe use of office machinery				

Supervisor/Assessor signature: _____ Date: _____

SECTION 6 USING WORD PROCESSING SOFTWARE

SKILL I Handling Files

WHAT IS INVOLVED?	
This activity will be carried out through a number of activities which are designed to develop the young apprentice's skills for handling files	
<i>The activities will involve</i>	<i>✓ when completed</i>
• Presentation	
• using office machinery (where necessary)	
• Planning	
• Organising	
• Communicating	
• Using technology	
• Reading	
• Checking	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Handling files
2	Combine information
3	Enter and edit text
4	Format text
5	Check text

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1. Company procedures/policies for use of computers	
2. Instruction on the correct use of required equipment , such as:	
• Workstation	
• Computer	

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1. Carry out the activities associated with handling computer files	
2. Gather and collate examples of how they have carried out the required activities	
3. Be observed by an experienced member of staff carrying out the required tasks	
4. Answer questions relating to carrying out the required tasks	

ACTIVITY TWO

6.1.2 Using the information you have gathered, explain and demonstrate the handling techniques appropriate to the software being used. Ask your supervisor to complete the Observation Checklist at the end of this section to record your actions on each type of software.

- Locating the file

- Opening the file

Date completed:

Confirmed:

ACTIVITY THREE

6.1.3 Using the information you have gathered, explain and demonstrate the following actions. Ask your supervisor to complete the Observation Checklist at the end of this section to record your actions on each type of software.

- How you identify who the file is for

- Determine if a printed copy is required and the required timescale for the activities you have to complete

- How the document was to be laid out

Date completed:

Confirmed:

ACTIVITY FIVE

6.1.5 Using the information you have gathered, demonstrate how to lay out a table to look like the example below. Ask your supervisor to complete the Observation Checklist at the end of this section to record your actions on each type of software.

Example

Supplier	Items	Cost
Jetmac Cleaners	Soap Powder x 4 boxes	£ 25.99
Wallmart Shops	Linen tee Towels x 50	£101.35
Supersave	Washing up Liquid x 20 boxes	£ 19.99
Petcare	Cat food x 4 bags	£ 6.99

Print off your example, and include your name and date on the printed document

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered, mark all your information as 'Handle files – Activity 6.1.1, 6.1.2, 6.1.3, 6.1.4 and 6.1.5 and put it in your portfolio. Ensure your supervisor has completed an observation checklist for **handling files** for each of the observed activities for all of the software programmes used.

OBSERVATION/WITNESS TESTIMONY CHECKLIST

HANDLING FILES

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Handled word processing software in line with company procedures				
Located files				
Opened files				
Laid out the document as per required instructions				
Worked within safe working practices				
Created a new file (if applicable)				
Saved and printed the file				
Set up document to create example table				
Dealt with the equipment as per procedures/policies safe use of office machinery				

Supervisor/Assessor signature: _____ Date: _____

SECTION 6 USING WORD PROCESSING SOFTWARE

SKILL 2 Combine Information

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for combining information	
<i>The activities will involve</i>	<i>✓ when completed</i>
• Presentation	
• using office machinery (where necessary)	
• Planning	
• Organising	
• Communicating	
• Using technology	
• Reading	
• Checking	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Handling files
2	Combine information
3	Enter and edit text
4	Format text
5	Check text

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1. Company procedures/policies for use of computers	
2. Instruction on the correct use of required equipment , such as:	
• Workstation	
• Computer	

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1. Carry out the activities associated with combining information	
2. Gather and collate examples of how they have carried out the required activities	
3. Be observed by an experienced member of staff carrying out the required tasks	
4. Answer questions relating to carrying out the required tasks	

OBSERVATION/WITNESS TESTIMONY CHECKLIST**COMBINING INFORMATION**

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Handled word processing software in line with company procedures				
Located organisation house-style (if applicable)				
Combined information using the 'insert' function				
Combined information using the 'size and position' commands				
Dealt with the equipment as per procedures/policies safe use of office machinery				

Supervisor'/Assessor signature: _____ Date: _____

SECTION 6 USING WORD PROCESSING SOFTWARE

SKILL 3 Enter and Edit Text

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for entering and editing text	
<i>The activities will involve</i>	<i>✓ when completed</i>
• Presentation	
• using office machinery (where necessary)	
• Planning	
• Organising	
• Communicating	
• Using technology	
• Reading	
• Checking	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Handling files
2	Combine information
3	Enter and edit text
4	Format text
5	Check text

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1.	Company procedures/policies for use of computers
2.	Instruction on the correct use of required equipment , such as:
	• Workstation
	• Computer

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1.	Carry out the activities associated with entering and editing text
2.	Gather and collate examples of how they have carried out the required activities
3.	Be observed by an experienced member of staff carrying out the required tasks
4.	Answer questions relating to carrying out the required tasks

ACTIVITY TWO

6.3.2 Using the information you have gathered, explain and demonstrate how you would enter and edit text using the following commands. Ask your supervisor to observe the activity and complete the Observation Checklist at the end of this section.

- **Delete**
- **Cut**
- **Paste**
- **Drag and drop**
- **Find and replace**

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered, mark all your information as 'editing text – Activity 6.3.1 and 16.3.2 and put it in your portfolio. Ask your supervisor to complete the observation checklist for **entering and editing text** for each of the observed activities.

OBSERVATION/WITNESS TESTIMONY CHECKLIST**ENTERED AND EDITED TEXT**

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Handled word processing software in line with company procedures				
Located and opened existing document				
Entered new text				
Edited existing text				
Explained or dealt with as per procedures/policies safe use of office machinery				
Used the 'deleted' command to delete information				
Used the 'cut' command to cut text				
Used the 'copy' command to copy information				
Used the 'paste' command to paste information				
Used the 'drag and drop' command to drag and drop information				
Used the 'find and replace' command to find and replace information				

Supervisor/Assessor signature: _____ Date: _____

SECTION 6 USING WORD PROCESSING SOFTWARE

SKILL 4 Format Text

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for formatting text	
<i>The activities will involve</i>	<i>✓ when completed</i>
• Presentation	
• using office machinery (where necessary)	
• Planning	
• Organising	
• Communicating	
• Using technology	
• Reading	
• Checking	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Handling files
2	Combine information
3	Enter and edit text
4	Format text
5	Check text

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1.	Company procedures/policies for use of computers
2.	Instruction on the correct use of required equipment , such as:
	• Workstation
	• Computer

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1.	Carry out the activities associated with formatting text
2.	Gather and collate examples of how they have carried out the required activities
3.	Be observed by an experienced member of staff carrying out the required tasks
4.	Answer questions relating to carrying out the required tasks

OBSERVATION/WITNESS TESTIMONY CHECKLIST**FORMAT TEXT**

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Handled word processing software in line with company procedures				
Located and opened existing document				
Changed the layout of paragraphs				
Changed the characters within the document				
Changed the lines spacing within the documents				
Changed the page layout				
Dealt with the equipment as per procedures/policies safe use of office machinery				

Supervisor/Assessor signature: _____ Date: _____

SECTION 6 USING WORD PROCESSING SOFTWARE

SKILL 5 Check Text

WHAT IS INVOLVED?	
This skill will be carried out through a number of activities which are designed to develop the young apprentice's skills for checking text	
<i>The activities will involve</i>	<i>✓ when completed</i>
• Presentation	
• using office machinery (where necessary)	
• Planning	
• Organising	
• Communicating	
• Using technology	
• Reading	
• Checking	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Handling files
2	Combine information
3	Enter and edit text
4	Format text
5	Check text

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1. Company procedures/policies for use of computers	
2. Instruction on the correct use of required equipment , such as:	
• Workstation	
• Computer	

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1. Carry out the activities associated with checking text	
2. Gather and collate examples of how they have carried out the required activities	
3. Be observed by an experienced member of staff carrying out the required tasks	
4. Answer questions relating to carrying out the required tasks	

OBSERVATION/WITNESS TESTIMONY CHECKLIST

CHECK TEXT

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Handled word processing software in line with company procedures				
Located and opened the document				
Used the 'spell check' command to ensure accuracy				
Used the 'grammar check' command to ensure accuracy				
Used the 'word count' command to establish total number of words used				
Checked accuracy against the required instructions <i>Note: (This could spoken requirements or a draft document)</i>				
Dealt with the equipment as per procedures/policies safe use of office machinery				

Supervisor/Assessor signature: _____ **Date:** _____

SECTION 7 MAKING AND RECEIVING TELEPHONE CALLS

SKILL I Making telephone calls

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for making, receiving and transferring telephone calls	
<i>The activities will involve</i>	<i>✓ when completed</i>
• Questioning	
• Listening	
• Communicating	
• Presenting yourself	
• Summarising	
• Using technology	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Making telephone calls
2	Receiving and transferring telephone calls

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1. Company procedures for dealing with telephone calls and messages	
2. Operating procedures for telephones and telephone answering machines	

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1. Carry out the tasks associated with making, receiving and transferring telephone calls.	
2. Gather and collate examples of how they have carried out the required activities	
3. Be observed by an experienced member of staff carrying out the required tasks	
4. Answer questions relating to carrying out the required tasks	

ACTIVITY TWO

- 7.1.2 Explain below, and demonstrate to your supervisor, the organisations telephone system and how external calls are received and how calls are then transferred. Ask your supervisor to complete an Observation Checklist provided at the end of this section.

Date completed:

Confirmed:

ACTIVITY THREE

- 7.1.3 What are the most important things you should remember to do when receiving a telephone call and why?

Date completed:

Confirmed:

ACTIVITY FOUR

- 7.1.4 Gather information on how to transfer telephone calls internally. Record the details below

Date completed:

Confirmed:

ACTIVITY FIVE

- 7.1.5** Keep a record of a number of telephone calls you have received, messages you have recorded and calls you have then transferred to other colleagues internally. Ask your supervisor or colleague to complete an Observation Checklist as provided at the end of this section for any calls you have received which have been witnessed.

Date completed:

Confirmed:

DETAILS OF TELEPHONE CALLS YOU HAVE MADE

Calls dealt with:	Information you recorded or who you transferred the call to

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered, mark all your information as 'Making telephone calls – Activity 7.1.1, 7.1.2, 7.1.3, 7.1.4 and 7.1.5 and put it in your portfolio.

Ask your supervisor or colleagues to complete an observation checklist for **receiving and transferring telephone calls** each time you have handled a telephone call.

OBSERVATION/WITNESS TESTIMONY CHECKLIST**RECEIVING TELEPHONE CALLS**

APPRENTICE NAME: _____

DETAILS OF TELEPHONE CALL RECEIVED: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Young apprentice answered the telephone in accordance with the organisational procedure				
Young apprentice conducted the telephone call in a positive and professional manner				
Young apprentice gathered the required information during the call				
Young apprentice provided the caller with accurate information whilst protecting confidentiality and security of information				
The outcomes of the conversation were summarised prior to ending the call				
A message was recorded in the appropriate manner and passed on to the recipient in accordance with the organisations procedures				
The call was made in accordance with the organisations procedure				
The telephone equipment was used in accordance with operating procedures				

Supervisor/Assessor signature: _____ Date: _____

SECTION 7 MAKING AND RECEIVING TELEPHONE CALLS

SKILL 2 Receiving telephone calls

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for making, receiving and transferring telephone calls	
<i>The activities will involve</i>	<i>✓ when completed</i>
• Questioning	
• Listening	
• Communicating	
• Presenting yourself	
• Summarising	
• Using technology	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Making telephone calls
2	Receiving and transferring telephone calls

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1.	Company procedures for dealing with telephone calls and messages
2.	Company security and confidentiality procedure
3.	Operating procedures for telephones and telephone answering machines

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1.	Carry out the tasks associated with making, receiving and transferring telephone calls.
2.	Gather and collate examples of how they have carried out the required activities
3.	Be observed by an experienced member of staff carrying out the required tasks
4.	Answer questions relating to carrying out the required tasks

ACTIVITY TWO

- 7.2.2** Explain below, and demonstrate to your supervisor, the organisations telephone system and how external calls are received and how calls are then transferred. Ask your supervisor to complete an Observation Checklist provided at the end of this section.

Date completed:

Confirmed:

ACTIVITY THREE

- 7.2.3** What are the most important things you should remember to do when receiving a telephone call and why?

Date completed:

Confirmed:

ACTIVITY FOUR

- 7.2.4** Gather information on how to transfer telephone calls internally. Record the details below

Date completed:

Confirmed:

OBSERVATION/WITNESS TESTIMONY CHECKLIST**RECEIVING TELEPHONE CALLS**

YOUNG APPRENTICE NAME: _____

DETAILS OF TELEPHONE CALL RECEIVED: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Young apprentice answered the telephone in accordance with the organisational procedure				
Young apprentice conducted the telephone call in a positive and professional manner				
Young apprentice gathered the required information during the call				
Young apprentice provided the caller with accurate information whilst protecting confidentiality and security of information				
The outcomes of the conversation were summarised prior to ending the call				
A message was recorded in the appropriate manner and passed on to the recipient in accordance with the organisations procedures				
The call was made in accordance with the organisations procedure				
The telephone equipment was used in accordance with operating procedures				

Supervisor/Assessor signature: _____ Date: _____

SECTION 8 USING OFFICE EQUIPMENT

SKILL I Prepare to use a variety of office equipment

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for preparing to use a variety of equipment	
<i>The activities will involve</i>	<i>✓ when completed</i>
• Organising	
• Communicating	
• Using technology	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Prepare and use a variety of office equipment
2	Use the equipment to produce work
3	Ensure the equipment is ready for the next user

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1.	Company procedures/policies for using different office equipment
2.	Manufacturers instructions on all office equipment

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1.	Carry out the activities associated with preparation to use a variety of office equipment
2.	Gather and collate examples of how they have carried out the required activities
3.	Be observed by an experienced member of staff carrying out the required tasks
4.	Answer questions relating to carrying out the required tasks

ACTIVITY TWO

- 8.1.2 Why is it important to follow manufacturer's instructions when operating office equipment? Give particular examples:

Date completed:

Confirmed:

ACTIVITY THREE

- 8.1.3 Explain how you ensure you are using the correct equipment for an activity and that you have all the resources you needed

Date completed:

Confirmed:

ACTIVITY FOUR

- 8.1.4 Prepare to operate each of the pieces of office equipment listed in Activity One and have your supervisor complete an Observation Checklist for each observed activity. List each piece of equipment in this section, and indicate where and when the activity took place.

	Office Equipment	Where Operated	When Operated
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered, mark all your information as 'prepare to use a variety of office equipment – Activity 8.1.1, 8.1.2, 8.1.3, and 8.1.4 and put it in your portfolio. Ensure your supervisor has completed an observation checklist for **preparing to use a variety of office equipment** for each observed activity.

OBSERVATION/WITNESS TESTIMONY CHECKLIST

PREPARE TO USE A VARIETY OF OFFICE EQUIPMENT

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Worked in line with organisation procedures/policies for the safe use of office equipment				

Supervisor/Assessor signature: _____ Date: _____

SECTION 8 USE OFFICE EQUIPMENT

SKILL 2 Use the equipment to produce work

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills to use office equipment to produce work	
The activities will involve	✓ when completed
• Organising	
• Communicating	
• Using technology	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Prepare and use a variety of office equipment
2	Use the equipment to produce work
3	Ensure the equipment is ready for the next user

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	✓ when completed
1.	Company procedures/policies for using different office equipment
2.	Manufactures instruction on all office equipment

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	✓ when completed
1.	Carry out the activities associated with the use of office equipment to produce work
2.	Gather and collate examples of how they have carried out the required activities
3.	Be observed by an experienced member of staff carrying out the required tasks
4.	Answer questions relating to carrying out the required tasks

ACTIVITY TWO

8.2.2 Explain why it is important to waste as few resources as possible

Date completed:

Confirmed:

ACTIVITY THREE

8.2.3 Explain how you would deal with any problems that arose while working with any piece of office equipment

Date completed:

Confirmed:

ACTIVITY FOUR

8.2.4 Explain how you would ensure that documents you were producing met a required standard and required deadlines

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered, mark all your information as 'Use office equipment – Activity 8.2.1, 8.2.2, 8.2.3, and 8.2.4 and put it in your portfolio. Ask your supervisor to complete an observation checklist for **using office equipment** for each observed activity for each piece of office equipment you are using over a period of time.

OBSERVATION/WITNESS TESTIMONY CHECKLIST

USE THE EQUIPMENT TO PRODUCE WORK

YOUNG APPRENTICE NAME: _____

OFFICE EQUIPMENT: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Young apprentice produced or processed documents using the office equipment in the appropriate manner				
Young apprentice used the office equipment to produce work or process documents within the required timescale				
Young apprentice produced or processed documents in an efficient and professional manner				
Young apprentice produced or processed documents in accordance with organisational standards				
Young apprentice worked in line with organisation procedures/policies for the safe use of office equipment				

If during the observation period the young apprentice did not deal with any areas listed, the following questions should be asked to ensure the young apprentice has investigated the procedures and understands the process.

- If there were no problems with any office equipment, ask the young apprentice to explain this procedure

Supervisor/Assessor signature: _____ Date: _____

SECTION 8 USE OFFICE EQUIPMENT

SKILL 3 Ensure the equipment is ready for the next user

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills to ensure the equipment is ready for the next user	
<i>The activities will involve</i>	<i>✓ when completed</i>
• Organising	
• Communicating	
• Using technology	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Prepare and use a variety of office equipment
2	Use the equipment to produce work
3	Ensure the equipment is ready for the next user

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1.	Company procedures/policies for using different office equipment
2.	Manufacturers instruction on all office equipment

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1.	Carry out the activities associated with preparing the equipment ready for the next user
2.	Gather and collate examples of how they have carried out the required activities
3.	Be observed by an experienced member of staff carrying out the required tasks
4.	Answer questions relating to carrying out the required tasks

ACTIVITY ONE

- 8.3.1** List the office equipment and explain what you would do to ensure the piece of office equipment was left clean and hygienic. Ask your supervisor to observe you conducting this activity for each piece of office equipment listed, and complete the Observation Checklist at the end of this section.

Date completed:

Confirmed:

ACTIVITY TWO

- 8.3.2** What are the main duties you would carry out daily to ensure that the equipment, resources and work area is ready for the next user

Date completed:

Confirmed:

ACTIVITY THREE

- 8.3.3** Explain why it is important to make sure that you leave the office equipment, resources and work ready for the next user

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered, mark all your information as 'Use office equipment – Activity 8.3.1, 8.3.2 and 8.3.3 and put it in your portfolio. Ask your supervisor to complete an observation checklist for **ensuring office equipment is ready for the next user** for each observed activity for each piece of office equipment

OBSERVATION/TESTIMONY CHECKLIST**ENSURE THE EQUIPMENT IS READY FOR THE NEXT USER**

YOUNG APPRENTICE NAME: _____

OFFICE EQUIPMENT: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Young apprentice left the equipment ready for the next user in accordance with the organisational standards				
Young apprentice left the resources required for operation of the equipment ready for the next user in accordance with the organisational standards				
Young apprentice left the work area ready for the next user in accordance with the organisational standards				
Young apprentice worked in line with organisation procedures for the safe use of office equipment				

Supervisor/Assessor signature: _____ Date: _____

SECTION 9 WORKING SAFELY

SKILL I Identify hazards

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for identify hazards in the working environment	
<i>The activities will involve</i>	<i>✓ when completed</i>
• Reading	
• Analysing	
• Decision- making	
• Communicating	
• Working safely	
• Personal presentation	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Identify hazards
2	Evaluate risks
3	Take action to reduce risks

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1. Accident Procedures	
2. Health and Safety Risk Assessment information	
3. Work Place Policies	
4. Manufacturers Instructions for safe use of office equipment	

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1. Carry out the activities associated with identifying risks in the workplace	
2. Gather and collate examples of how they have carried out the required activities	
3. Be observed by an experienced member of staff carrying out the required tasks	
4. Answer questions relating to carrying out the required tasks	

ACTIVITY FIVE

- 9.1.5 Explain how you ensure that you are working in line with the most recent workplace health and safety procedure

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered, mark all your information as 'Ensure your own actions reduce risks to health and safety – Activity 9.1.1, 9.1.2, 9.1.3, 9.1.4, and 9.1.5 and put it in your portfolio. Ask your supervisor to complete the observation checklist for **ensuring your own actions reduce risks to health and safety** for each observed activity.

OBSERVATION/WITNESS TESTIMONY CHECKLIST**IDENTIFY RISKS**

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Worked in accordance with organisations procedures and policies for the safe use of office equipment				
Worked in accordance with the organisations procedures for safe working practices				
Young apprentice Identified any working practices within their job role which could harm to him/herself and others				

Supervisor/Assessor signature: _____ Date: _____

SECTION 9 WORKING SAFELY

SKILL 2 Evaluate Risks

WHAT IS INVOLVED?	
This skill will be demonstrated through a number of activities which are designed to develop the young apprentice's skills for evaluating risks	
<i>The activities will involve</i>	<i>✓ when completed</i>
• Reading	
• Analysing	
• Decision- making	
• Communicating	
• Working safely	
• Personal presentation	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Identify hazards
2	Evaluate risks
3	Take action to reduce risks

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1.	Accident Procedures
2.	Health and Safety Risk Assessment
3.	Work Place Policies
4.	Manufactures Instructions for office equipment

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1.	Carry out the activities associated with evaluating risks in the workplace
2.	Gather and collate examples of how they have carried out the required activities
3.	Be observed by an experienced member of staff carrying out the required tasks
4.	Answer questions relating to carrying out the required tasks

ACTIVITY TWO

- 9.2.2** Explain why you work in line with workplace health and safety procedures and suppliers or manufactures instructions for the safe use of equipment, materials and products

Date completed:

Confirmed:

COMPLETING THE ACTIVITIES

Once these activities have been completed and all information has been gathered, mark all your information as 'Evaluate risks – Activity 9.2.1, 9.2.2, and 9.2.3 and put it in your portfolio. Ask your supervisor to complete the observation checklist for **evaluate risks**

OBSERVATION/WITNESS TESTIMONY CHECKLIST**EVALUATE RISKS**

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Worked in line with organisation procedures/policies for the safe use of office equipment				
Young apprentice Identified any working practices within their job role which could harm him/herself and others and evaluated the potential or actual risks associated with the working practices				

Supervisor/Assessor signature: _____ Date: _____

SECTION 9 WORKING SAFELY

SKILL 3 Take action to reduce risks

WHAT IS INVOLVED?	
This skill will be demonstrated out through a number of activities which are designed to develop the young apprentice's skills for take action to reduce risks	
<i>The activities will involve</i>	<i>✓ when completed</i>
• Reading	
• Analysing	
• Decision- making	
• Communicating	
• Working safely	
• Personal presentation	

ACTIVITIES REQUIRED TO COMPLETE THIS SECTION	
1	Identify hazards
2	Evaluate risks
3	Take action to reduce risks

WHAT THE YOUNG APPRENTICE NEEDS TO KNOW	
	<i>✓ when completed</i>
1.	Accident Procedures
2.	Health and Safety Risk Assessment
3.	Work Place Polices
4.	Manufacturers Instructions for safe use of office equipment

WHAT THE YOUNG APPRENTICE NEEDS TO DO	
	<i>✓ when completed</i>
1.	Carry out the activities associated with taking action to reduce risks in the workplace
2.	Gather and collate examples of how they have carried out the required activities
3.	Be observed by an experienced member of staff carrying out the required tasks
4.	Answer questions relating to carrying out the required tasks

ACTIVITY ONE

- 9.3.1 Investigate, gather information and explain the procedure for reporting high risk hazards to in the workplace

Date completed:

Confirmed:

ACTIVITY TWO

- 9.3.2 Explain how you would deal with low risk hazards in accordance with workplace polices and legal requirements

Date completed:

Confirmed:

ACTIVITY THREE

- 9.3.3 List any suggestions you would make (or have made) for reducing risks to health and safety within your workplace, based on the working practices you identified in Skill One. Record your suggestions in the section below.

Date completed:

Confirmed:

OBSERVATION/WITNESS TESTIMONY CHECKLIST

TAKING ACTIONS TO REDUCE RISKS

YOUNG APPRENTICE NAME: _____

ACTIVITY	ACHIEVED (✓)	COMMENT	SUPERVISORS INITIALS	DATE
Worked in accordance with organisations procedures and policies for the safe use of office equipment				
Worked in accordance with the organisations procedures for safe working practices				
Young apprentice Identified any working practices within their job role which could harm to him/herself and others and took the appropriate actions to minimise risks and improve working practices				

Supervisor/Assessor signature: _____ Date: _____

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