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EUROPEAN PERSONAL ASSISTANT LEVEL 2

EUPA Assessment TOOL

Revision 3

[W.P 3 Deliverable 8-First Draft]

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Introduction to the assessors

What is EUPA Assessment Tool

The objective of EUPA Assessment Tool is to assess the situation of a personal assistant on each of the learning outcomes identified in the qualifications framework.

The design of the EUPA Assessment tool promotes the identification of qualifications (knowledge, skills and competencies) independently of the way they have been acquired.

The assessment tool consists of specially developed exercises (written exercises, tests, multiple choice questions etc), interview questions, professional discussion, declarative statements and simulations to assess the knowledge, skills and competences of the personal assistant being assessed.

The EUPA Assessment tool is be accompanied by:

1. **An electronic examiner's sheet (EUPA Electronic Assessor)** through which the assessor can assess the PA on each of the learning outcomes. Taking into account the fact that each learning outcome has its own weight, the examiner's sheet can produce a total assessment mark for the personal assistant being assessed.
2. The **EUPA Current Situation Map** which presents the current situation of the personal assistant in terms of knowledge, skills and competences as compared to an ideal situation.

Moreover the Current Situation Map defines a development map for the PA being assessed.

Factors to be taken into account

1. Observation is a method that needs to be used for achieving reliability and validity. However, during pilot assessments observations will not be used, because this is an exploratory project (that is no real certification will be given to the participants), therefore it will be difficult to persuade companies or organisations to accept observation
2. The fact that the project involves also inactive (unemployed) women means that observation cannot be applied as a method of assessment.
3. Therefore, all assessments will be performed in the offices (or other locations) of the partners

Types of evidence

- Direct Observation of the learners performance by their assessor
- Outcomes from oral or written questioning
- Products of the learner's work
- Personal Statements and /or reflective accounts
- Outcomes from simulation, where permitted by the assessment strategy
- Professional Discussion
- Assignment, project/case studies
- Authentic statements/witness testimony
- Expert witness testimony
- Evidence of recognition of Prior Learning

Comments etc for assessors

WORK AREA 2.1 BASIC OFFICE PROCEDURES

WORK AREA CODE	2.1
WORK AREA TITLE	BASIC OFFICE PROCEDURES
UNIT	2.1.1 Handle Mail
Learning Outcome LO1	1. Be able to describe the procedure through which the organization handles incoming and outgoing mail
Credits assigned	3
Number of assessments used	3
Assessment Criteria	Assessment tools
1. Be able to describe the procedure the company uses to handle incoming and outgoing mail 2. Describe possible problems which may arise when dispatching and distributing mail and how these can be solved/treated	WRITTEN EXERCISE (1 credit) 1. Participants are asked to describe in writing the method they would use to distribute incoming mail as well as to record outgoing mail. REFLECTIVE DISCUSSION (1 credit) 2. Evidence may also be supplied through learner reflective discussion and questioning WRITTEN EXERCISE (1 credit) 3. Participants are asked to describe in writing possible problems that may arise when dispatching mail and how are these being treated

Notes

Written exercise

Participants are expected to mention the following:

Incoming mail

- Collect mail from P.O box or post office
- Implement any control of documents, in accordance with company policy
- Update incoming mail log
- Deal with junk mail (junk mail are consider to be adverts that are not related to the company's activities)
- Deal with confidential mail
- Distribute mail

Outgoing mail

- Deal with outgoing mail in accordance with the company policy
- Keep copies (electronic or hard copy) of outgoing mail
- Keep in mind deadlines
- Availability of stamps in the office

Reflective discussion

- Along the lines mentioned above

Written exercise (Possible Problems)

- Missing deadlines due to delayed dispatch of mail
- Mail not dispatched due to misplacement
- Wrong or missing recipient details may cause mail to be returned

Comments etc for assessors

WORK AREA CODE	2.1
WORK AREA TITLE	BASIC OFFICE PROCEDURES
UNIT	2.1.1 Handle Mail
Learning Outcome L02	2. Be able to arrange incoming mail appropriately
Credits assigned	4
Number of assessments used	2 out of 3
Assessment Criteria	Assessment tools (Guidance)
1. Receive, check and sort incoming mail or packages 2. Identify and deal with unwanted junk mail appropriately 3. Identify and deal with suspicious items 4. Distribute incoming mail 5. Record incoming mail on a record log	WRITTEN EXERCISE/SIMULATION (2 credits) 1. Participants are given in writing the company policy on recording incoming mail, as well as 5 pieces of mail (including junk mail). Participants are also given the formal template used by the company to record mail. Participants are asked to record the mail [SELECT ONE OF THE TWO EXERCISES] INSPECTION OF SUPPLIED EVIDENCE OR 2. Evidence may be supplied through observation, discussion, inspection of activities using sources like mail records and log book- special deliveries OR PROFESSIONAL DISCUSSION Participants are asked to explain: 3. What is considered to be junk mail? How they would deal with suspicious items?

NOTES

Written exercise

- Mail Documents and solution are provided in the next page

Inspection of supplied evidence

- May include inspection of mail logs or control of document files

Professional Discussion

- Junk email- Participants are expected to mention mass mailing that is not related to their work- identify the fact that they must have a look before classifying something as junk mail etc
- Suspicious items- Participants are expected to mention some characteristics of a mail item that would classify it as suspicious, such as no sender, strange packaging, country of origin etc. They must state that in such a situation, they will contact the safety officer or their supervisor.

Comments etc for assessors

WORK AREA CODE	2.1
WORK AREA TITLE	BASIC OFFICE PROCEDURES
UNIT	2.1.1 Handle Mail
Learning Outcome L03	3. Be able to collect, arrange and dispatch outgoing mail accurately
Credits assigned	7
Number of assessments used	3 out of 4
Assessment Criteria	Assessment tools (Guidance)
1. Collect, sort and prioritise outgoing mail or packages 2. Identify best methods for dispatching mail 3. Agree a cost for dispatching mail items 4. Arrange services for collecting outgoing mail 5. Identify outgoing mail that is urgent 6. Record postage cost 7. Record outgoing mail	WRITTEN EXERCISE (4 credits) 1. Participants are given in writing the company policy on recording outgoing mail as well as 5 pieces of mail (including urgent, international and local). They are asked to describe how they would implement the company policy PROFESSIONAL DISCUSSION (1 credit) 2. Please identify possible methods for dispatching mail [SELECT ONE OF THE TWO EXERCISES] WRITTEN EXERCISE (1 credit) 3. You are given instructions to dispatch a package that will be sent abroad using the most cost effective method. Please describe the process you will follow to achieve this result. OR WRITTEN EXERCISE (1 Credit) 4. The postage costs for the company you work for have increased. You have been given the task to find a way to record the postage costs. Please produce a sample of such a log.

NOTES

Written exercise

- Participants are expected to follow the company procedure and fill in the outgoing log
- Professional Discussion
- Normal mail (local)
- International mail
- Registered mail
- Courier local
- International courier (DHL etc)

Written exercise

- The mail issue here is that participants can demonstrate understanding of the phrase 'cost effective'. Parameters that define cost effectiveness are cost and delivery time. Therefore, participants must state that they will search alternatives and compare them on the two parameters identified.

Written exercise

- A possible log might look similar to the one below

Date	Type of cost*	Recipient	Cost	Requested by**

- Normal postage, registered, local courier etc
- **Name of person in the company or organization

Comments etc for assessors

WORK AREA CODE	2.1
WORK AREA TITLE	BASIC OFFICE PROCEDURES
UNIT	2.1.2 Handle Stock
Learning Outcome LO 4	4. Be able to explain and describe the stock control procedures that apply in the office in order for the office to run smoothly
Credits assigned	3
Number of assessments used	3
Assessment Criteria	Assessment tools (Guidance)
1. Outline organisational requirements for ordering, taking delivery, storing, stock-taking, issuing and disposing stock items 2. Outline ways of keeping up to date, accurate and legible records of stationery stock items 3. Outline the procedure used for ordering from a specific supplier	PROFESSIONAL DISCUSSION (1 credit) - Please describe stock control issues with emphasis on the following: - Monitoring the level of stock - Ordering new stock - Disposing stock (if applicable in their company) - Stock Taking VERBAL EXERCISE (1 credit) - Please explain how you select the suppliers from whom you order your stock VERBAL EXERCISE (1 credit) - Please explain how you deal with office stationery orders

NOTES

Professional Discussion

- Participants are expected to discuss the importance of monitoring the stock in order to avoid malfunction of the office due to lack of suppliers. They are expected to talk about minimum reorder quantities, stock monitoring techniques. They are also expected to relate stock monitoring with stock ordering and be able to describe procedures for stock ordering. Written orders as well as agreeing costs in advance are essential issues that should be stated. As far as ordering is concerned, the following stages (or similar) should be mentioned:
- Identify goods
- Refer to appropriate supplier
- Ask for quotation if it is a new one or if it is someone which you are using regularly, add in supplier's database
- Ask authorization for buying the products (refer to price)
- Raise order (refer to price, quality, delivery date and delivery arrangements)
- Create a purchase order that includes the same as above

Verbal Exercise

- If a company does not approve supplier, set quality criteria, get references, ask for quotations etc. Examine whether the supplier is also a customer as well.

Verbal Exercise

- Similar procedure as that for ordering stock e.g. monitor current stock, set reorder quantities, do regular stock controls to know quantities you have in stock. Additionally, it may be useful to have a set procedure of getting feedback from colleagues.

Comments etc for assessors

WORK AREA CODE	2.1
WORK AREA TITLE	BASIC OFFICE PROCEDURES
UNIT	2.1.2 Handle Stock
Learning Outcome LO 5	5.Be able to maintain the right level of stock needed to run the office smoothly using specific procedures and tools
Credits assigned	3
Number of assessments used	3
Assessment Criteria	Assessment tools (Guidance)
1. Maintain stationery stock items to required levels 2. Order stationery stock from suppliers within limits of own authority 3. Chase up orders with suppliers 4. Check incoming deliveries against orders and report any problems 5. Keep up to date, accurate and legible records of stock delivered and held	Multiple choice question (1 credit) 1. Company XXX uses on average 50 packets of paper per week. Paper is ordered every Wednesday and the supplier does not accept orders on any other day. Today is Tuesday afternoon and we have 20 packets left. Select the most appropriate response to this issue a. Order 10 packets b. Order 50 packets c. No need to order now. Lets' wait until Friday Written exercise (1 credit) 2. Participants are given an excel spreadsheet presenting all stock items together with the actual number in stock and the minimum reorder level. Participants are asked to set the reorder quantities for each element of stock Verbal exercise (1 credit) 3. You have identified the need for ordering stock. Please describe in detail your steps from this point until stock reaches the office.

NOTES

Multiple choice questions

- Answer: b

Written exercise

Stock Description	Min, Reorder Level	Min, Reorder quantity	Quantity in stock	Order Level		
Pens	100	60	50	110		

Verbal

Exercise

- Identify the quantity of stock that needs to be ordered
- If there is an approved supplier contact the supplier
- If there is no approved supplier search for a supplier
- Prepare written order and send to supplier
- When goods are delivered, check quantities and specifications to ensure that they are in accordance with your order.

Comments etc for assessors

WORK AREA 2.2 GENERAL KNOWLEDGE OF OFFICE EQUIPMENT

WORK AREA CODE	2.2
WORK AREA TITLE	GENERAL KNOWLEDGE OF OFFICE EQUIPMENT
UNIT	2.2.1 Use of office equipment
Learning Outcome	6. Know the various equipment and services that support the office and be able to use the basic equipment at a basic level
LO 6	
Credits assigned	13
Number of assessments used	4
Assessment Criteria	Assessment tools (Guidance)
1. Identify different types of equipment and their uses 2. Explain why different types of equipment are chosen for tasks 3. Locate and select equipment needed for a task 4. Use equipment following manufacturer's guidelines, as well as guidelines of the organisation 5. Keep equipment clean, hygienic and/or safe 6. Deal with problems which might arise following the guidelines set by the organisation and the manufacturers	Verbal Exercise (5 credits) 1. Please describe the use of the following equipment and where each equipment can be founded: a. Photocopier b. Binding Machine c. Scanner d. Printer e. Fax Observation (3 credits) 2. Participants demonstrate correct usage of some equipment Verbal Exercise (2 credits) 3. How do you ensure that you use equipment correctly? What do you do to maintain the equipment? Verbal Exercise (3 credits) 4. Explain alternative strategies for troubleshooting an equipment

NOTES

Verbal Exercise

- Participants are asked to describe the purpose of different equipment; that is describe the situations in which they would use different equipment

Observation

- Participants will use different types of equipment

Verbal Exercise

- Usage and maintenance of equipment-For usage of equipment, participants are expected to mention user manuals, training by suppliers, help from co-workers. For maintenance, they are expected to mention user manuals, internet web sites. Additionally, they may mention scheduling maintenance.

Verbal Exercise

- Alternative strategies to troubleshooting could be:
 - Manuals
 - Internet
 - Trial and error to identify the problem
 - Conversation with technician

Comments etc for assessors

WORK AREA 2.3 BASIC BUSINESS COMMUNICATION

WORK AREA CODE	2.3
WORK AREA TITLE	BASIC BUSINESS COMMUNICATION
UNIT	2.3.1 Basic Business Communication
Learning Outcome	7. Understand how to communicate verbally in a clear and effective way
LO 7	
Credits assigned	6
Number of assessments used	1
Assessment Criteria	Assessment tools (Guidance)
1. Describe different methods of communication 2. Describe when to use different methods of communication 3. Identify barriers to communication 4. Describe ways of verbally presenting information and ideas clearly 5. Describe techniques of active listening 6. Understand Active Listening 7. Understand the principles of clear and effective communication a. Explain reasons for knowing the audience to whom the communication is being presented b. Explain reasons for knowing the purpose of communication	Reflective Discussion and questioning (6 credits) <u>Participants will be asked to discuss along the lines of the assessment criteria:</u>

NOTES

Reflective discussion and questioning

- **Written communication**- official documents, written prove, communicate with people abroad, forward a large amount of data through emails rather than sending by post (**Barriers: language, easy to misunderstand, level of education**)
- **Verbal communication**-
 - Telephone (no body language, still tone of voice, no need for dress code)
 - Face to face(**Barriers: language, level of education**)
- **Body Language**

Ways of verbally presenting ideas

- Dialogue
 - Presentation
 - Team discussion
 - Conference
- Using:
- Words
 - Tone of voice
 - Body language

Active listening techniques

- Questions
- Paraphrasing
- Small recaps
- Empathise
- Short pauses

Comments etc for assessors

WORK AREA CODE	2.3
WORK AREA TITLE	BASIC BUSINESS COMMUNICATION
UNIT	2.3.1 Basic Business Communication
Learning Outcome	8. Understand and be able to use the principles of effective telephone communications
LO 8	
Credits assigned	2
Number of assessments used	2
Assessment Criteria	Assessment tools (Guidance)
1. Be able to use effectively telephone techniques 2. Explain the advantages and limitations of telephone communication 3. Describe organisational procedures when receiving or making a telephone call 4. Identify and describe different stages involved in telephone (incoming and outgoing) and techniques that should be used in each of them 5. Describe information that could affect confidentiality and security and how to handle these	Role Play (1 credit) 1. Role play can be used on any scenario for testing the assessment criteria. [Role Play on any Scenario] [SELECT ONE OF THE TWO EXERCISES] Evidence collected (1 credit) 2. Evidence for testing that the participant uses the correct telephone techniques, might be collected from memos and telephone logs. Observation that the telephone system is used correctly OR Professional Discussion (1 credit) 3. Discuss with learners: • Advantages and limitations of telephone communication • The key stages of an inbound as well as an outbound telephone conversation together with the techniques needed in each • Issues that must be treated with confidentiality

NOTES

Evidence

- From memos, messages, telephone logs

Professional Discussions

- Limitations of telephone communication is the fact that you cannot see the body language, therefore you rely on the words used and tone of voice
- Advantages of telephone communication is that you do not need to move and waste time, external appearance does not matter etc
- The key stages of an inbound as well as an outbound telephone conversation together with the techniques needed in each
- inbound telephone
 - greeting and welcome
 - main part of the call-control the conversation (active listening)
 - action plan and thank the caller
- outbound stages are the same but before the main part you need to make sure that the time is appropriate
- issues that must be treated with confidentiality: health issues, personal matters etc

Comments etc for assessors

WORK AREA CODE	2.3
WORK AREA TITLE	BASIC BUSINESS COMMUNICATION
UNIT	2.3.1 Basic Business Communication
Learning Outcome LO 9	9. Understand the relationships with customers and other external stakeholders
Credits assigned	2
Number of assessments used	2
Assessment Criteria	Assessment tools (Guidance)
1. Identify stakeholders in an organisation 2. Explain the purpose and value of building positive working relationships with them 3. Describe how to treat other people in a way that is sensitive to their needs 4. Describe how to treat other people in a way that respects their abilities, background, values, customs and beliefs	Verbal Exercise (1 credit) 1. Identify three important stakeholders Written Exercise (1 credit) 2. Describe key techniques for establishing and maintaining relationships with key stakeholders.

NOTES

Verbal Exercise

- Customers, employees, suppliers

Written Exercise

- PR activities: i.e. birthday wishes, Christmas cards, remember names or children, spouse etc
- Meet them personally
- Take into account cultural differences
- Keep in touch (even if they have not recently used the company and its services)

Comments etc for assessors

WORK AREA CODE	2.3
WORK AREA TITLE	BASIC BUSINESS COMMUNICATION
UNIT	2.3.1 Basic Business Communication
Learning Outcome	10. Develop and maintain working relationships within the organization
LO10	
Credits assigned	2
Number of assessments used	2
Assessment Criteria	Assessment tools (Guidance)
1. Identify communication methods to use within the organisation 2. Describe the need for positive working relationships both within and outside the team 3. Describe how behaviour of an individual can affect other people at work	Observation (1 credit): is the ideal method for this learning outcome but not possible in EUPA case 1. Evidence can be obtained through workplace activities, witness testimony, discussion, inspection and feedback received from stakeholders Professional Discussion (1 credit) 2. Discussion with learner on the assessment criteria. Assessment criteria should not be mentioned to the learners. Through general discussion on working relationships within the organization the learners should identify some or all of the criteria. Then assessment criteria questions should be mentioned.

NOTES

Professional Discussion

Identify communication methods to use within the organisation

- All communication methods are possible but need to select the best method for each situation:
- Written communication is considered to be more formal than verbal communication. Then email is less formal than corporate letters etc
- Formal language is required—'modern' language is not acceptable
- Attention to plural and singular

Describe the need for positive working relationships both within and outside the team

- More productive
- Better psychology during work, therefore more customer orientation

Describe how behaviour of an individual can affect other people at work.

- Good behaviour means better working environment, more client orientation

Comments etc for assessors

WORK AREA 2.4 BASIC WRITTEN COMMUNICATION

WORK AREA CODE	2.4
WORK AREA TITLE	BASIC WRITTEN COMMUNICATION
UNIT	2.4.1 Basic Written Communication
Learning Outcome	11. Be able to understand different forms of written communication
LO 11	
Credits assigned	4
Number of assessments used	1
Assessment Criteria	Assessment tools (Guidance)
1. Describe different types of documents that may be designed and produced and the different styles that could be used 2. Describe different formats in which text may be presented	Verbal Exercise (1 credit each) 1. Describe different types of documents that may be used at work 2. Describe different formats in which text may be presented Written Exercise (2 credits) Participants will be given case study scenarios to refer to which written documents could be sent at each time: 1- You have a dissatisfied customer. What document can you send? 2- You need to update your manager regarding a task/project etc, what kind of written document can you use

NOTES

Verbal Exercise

- Describe different types of documents that may be used at work
 - Email
 - Fax
 - Letter
 - Report
 - Memo
 - Telephone message
- Describe different formats in which text may be presented (and where each is more appropriate)
 - Normal document- to express ideas or feelings or arguments
 - Tables- a good method for displaying data
 - Graphs- Especially when dealing with significant amount of numbers or data analysis:
 - Easy to read
 - Visually appealing
 - Handles large data sets easily using keyed icons

Written Exercise

- A letter is probably the best solution to recover a customer complain
- Depending on the size of the project you could use an email for a small project or a report for a big project (avoid using email containing lots of information)

Comments etc for assessors

WORK AREA CODE	2.4
WORK AREA TITLE	BASIC WRITTEN COMMUNICATION
UNIT	2.4.1 Basic Written Communication
Learning Outcome	12. Be able to produce a variety of routine business documents
LO 12	
Credits assigned	4
Number of assessments used	1 out of 2
Assessment Criteria	Assessment tools (Guidance)
1. Organise, structure and present information so that it is clear and accurate, and meets the needs of the audience 2. Organise content required to produce documents 3. Format and produce documents to an agreed style	Evidence(credits 4) 1. Participants can provide 8 different routine documents they have produced (e.g. letters, emails, memos) OR Written Exercise (4 credits) 1. Write a letter to a supplier asking them to provide you with a quotation for a specific product or service (<i>a template must be provided</i>) 2. Write an incompany memo informing others for a new company policy (<i>a template must be provided</i>) 3. Write a letter to a potential employee informing them that his application has not been successful (<i>a template must be provided</i>)

NOTES

Evidence or written Exercise

- The following should be taken into account when assessing the exercise
 - Document presentation should facilitate easy reading
 - Information on the document must be well presented
 - Content of the document must be well organised (paragraphs, structure of document etc)

Comments etc for assessors

WORK AREA CODE	2.4
WORK AREA TITLE	BASIC WRITTEN COMMUNICATION
UNIT	2.4.1 Basic Written Communication
Learning Outcome	13. Be able to communicate in writing at a level that is appropriate for business
LO 13	
Credits assigned	5
Number of assessments used	1 out of 2
Assessment Criteria	Assessment tools (Guidance)
1. Use language that suits the purpose and audience 2. Use correct grammar, punctuation, spelling	Evidence (5 credits) 1. Participants can provide 2 more complicated documents that they have produced, such as complicated letters or reports, that indicate clearly correct use of language, structure etc OR WRITTEN EXERCISE (5 Credits) 2. Country and Language dependent: Provide the learner with a scenario and ask them to compose a document (from scratch) based on that scenario

NOTES

Evidence or written Exercise

- The following should be taken into account when assessing the exercise
 - Objectives of the document must be clearly set
 - Structure of the document (with introduction, main issues and conclusions)
 - Language used should be professional
 - Tone should be cooperative and positive
 - Spelling and grammar must be correct
 - Document presentation should facilitate easy reading

Comments etc for assessors

WORK AREA 2.5 MAINTENANCE OF ESTABLISHED FILING SYSTEM AND BASIC BUSINESS DOCUMENTATION

WORK AREA CODE	2.5
WORK AREA TITLE	MAINTENANCE OF ESTABLISHED FILING SYSTEM AND BASIC BUSINESS DOCUMENTATION
UNIT	2.5.1 Maintenance of an established filing system
Learning Outcome	14. Maintenance of an established filing system
LO 14	
Credits assigned	6
Number of assessments used	1
Assessment Criteria	Assessment tools (Guidance)
1. Be able to keep files up to date 2. Explain the reasons for maintaining a filing system 3. Discuss techniques for maintaining an up to date filing system 4. Explain the purpose of storing documents safely and accurately 5. Explain the purpose of confidentiality and data protection	Professional Discussion 1. Learners will discuss the importance of maintaining a filing system as well as the techniques they use to achieve this

NOTES

Professional Discussion

- Through the discussion, assessors must be able to understand the following:
 1. That learners realize the importance of filing
 2. That, as part of their time management, they leave enough time for filing e.g. some time every day
 3. That they realize the importance of storing document safely and accurately
 4. That they realize that some of the documents may include confidential information and therefore they must be treated accordingly.

Comments etc for assessors

WORK AREA CODE	2.5
WORK AREA TITLE	MAINTENANCE OF ESTABLISHED FILING SYSTEM AND BASIC BUSINESS DOCUMENTATION
UNIT	2.5.2 Basic Business Documentation
Learning Outcome	15. Be able to prepare, interpret and check entries of business documents
LO 15	
Credits assigned	6
Number of assessments used	2
Assessment Criteria	Assessment tools (Guidance)
Prepare, interpret, check and explain the entries in documents used for: • Buying and Selling – price-lists, quotations, estimates, orders, invoices, credit notes, statements. • Receipts and Payments – receipts, paying slips, cheques, credit transfers, direct debits, standing orders, credit/debit cards, expense claim forms. • Stock Control – requisitions, inventories, stock control cards. Outline procedures used for the following: • Check, identify and correct errors in business documents.	Professional Discussion (3 credits) • Learners will present their experience and/or knowledge of different business documents in accordance to the assessment criteria. They will demonstrate clear understanding of the entries on different documents. They will also highlight methods for checking and identifying errors on business documents Multiple Choice (3 credits) An invoice is a. A billing document listing fees, expenses, charges, and descriptions of the work licensed, work created and/or goods delivered b. A list of items being ordered c. A proof that an amount has been paid A credit note is a. Same as the invoice but for services b. A document issued from the supplier to the client stating that the client owes money to the supplier. c. A method of cancelling an invoice A payment receipt is a. A statement indicating balance due b. That amount the client must pay (excluding VAT) c. A proof that somebody has paid an amount in settlement or part settlement of an invoice or as an exchange for the acquisition of goods or services

NOTES

Professional Discussion

Learners must define what entries usually appear on different business docs eg

Invoice

- Date
 - Customer details
 - Products or services
 - Unit price
 - Quantity
 - Net Total
 - Vat rate and amount
 - Total amount
- Credit note (similar to invoice) Order
- Date
 - Sales person
 - Product code or service
 - Quantity
 - Unit price
 - Delivery day
 - Payment terms

Learners are also expected to explain the procedures they would use to check a document eg a bank deposit or a supplier invoice in order to certify that it is correct (eg compare with internal docs or compare with a purchase order etc)

Multiple Choice questions

A, C, C

Comments etc for assessors

WORK AREA CODE	2.6
WORK AREA TITLE	HANDLING BASIC BUSINESS TRANSACTIONS AND PAYMENTS
UNIT	2.6.1 Understand basic business transactions and payments
Learning Outcome	16. Understand and follow business transactions and payment procedures.
LO 16	
Credits assigned	9
Number of assessments used	1
Assessment Criteria	Assessment tools (Guidance)
1. Understand accounting documents such as a credit note, a payment receipt and an invoice 2. Be able to issue receipts, invoices and credit notes 3. Be able to make and receive a payment 4. Reconcile petty cash account	Professional Discussion (4 credits) Learners discuss around the different types of accounting documents they can handle They explain how they would go about issuing an invoice or a credit note and describe the procedure of receiving a payment Written Exercise (3 credits) Learners are given three receipts paid from the petty cash of the company. The initial amount of the petty cash was 100 euros. What is the balance of the petty cash today? Simulation (2 credits) Learners are provided with some information and are asked to issue an invoice. The last invoice number issued is also given.

NOTES

Verbal Exercise

Different types of accounting documents

- Invoice (customer/supplier)/ credit note
- Receipt
- Bank deposit
- Bank statement
- order
- way bill

In order to issue an invoice "

- get the invoice number (if not done automatically by the system)
- enter date
- enter invoice description (details of product or services together with codes if applicable) and unit price
- Calculate total
- Apply VAT on total if applicable
- Enter payment terms

Explain the process of receiving a payment

Issues that must be stressed here is that

- In case of cash you check in front of the customer
- Double check change

Written Exercise

- Total amount of perry cash- receipts

Simulation

- enables the assessor to assess the familiarity of the learner with the specific type of document

Comments etc for assessors

WORK AREA 2.7 ORGANISE BUSINESS TRAVEL AND ACCOMMODATION, ORGANISE AND SUPPORT MEETINGS & HANDLING DIARY SYSTEMS

WORK AREA CODE	2.7
WORK AREA TITLE	ORGANISE BUSINESS TRAVEL AND ACCOMMODATION, ORGANISE AND SUPPORT MEETINGS AND HANDLING DIARY SYSTEMS
UNIT	2.7.1 Organize Business travel and accommodation
Learning Outcome	17. Be able to make business travel and accommodation arrangements in accordance with a deadline and in line with budget requirements
LO 17	
Credits assigned	1
Number of assessments used	1 out of 2
Assessment Criteria	Assessment tools (Guidance)
- Describe the main types of business travel or accommodation arrangements that may need to be made and the procedures to follow - Identify sources of information - Describe how to keep records of business travel or accommodation arrangements - Book suitable business travel or accommodation arrangements, following instructions: - to meet the brief and budget using available sources of information - obtaining best value for money - making payment or agreeing payment arrangements - Identify possible risk factors and techniques for their elimination	Observation (1 credit)- [observation is not possible in the case of EUPA] - Evidence may be supplied via observation of workplace activities, witness testimony, professional discussion, learner reports/reflective accounts and inspection using evidence like letters, emails, memos, briefs and budgets OR Discussion (1 credit) - Participants will be asked to describe their experience in making travel and accommodation arrangements. Additionally they will be asked to identify possible problems (risks) that could arise, as well techniques for eliminating these risks.

NOTES

Professional Discussion

- Describe the main types of business travel or accommodation arrangements that may need to be made and the procedures to follow
 - Book flights
 - Book hotel
 - Book train tickets
- Identify sources of information
 - Internet
 - Travel Agent
- Describe how to keep records of business travel or accommodation arrangements
 - Keep copies of itinerary, hotel confirmation, train confirmation etc
- Book suitable business travel or accommodation arrangements, following instructions:
 - to meet the brief and budget using available sources of information, to obtain value for money:
- a. Take into account
 - the time the meeting or event starts (affects the arrival time)
 - Distance between airport and hotel (and identify possible transportation methods)
 - Check for any special offers (e.g. stay 3 nights and pay for 2)
- b. Agree payment terms or make the payment
- Identify possible risk factors and techniques for their elimination
 - Connected flights where one flight may be delayed and result in missing the other

Comments etc for assessors

WORK AREA CODE	2.7
WORK AREA TITLE	ORGANISE BUSINESS TRAVEL AND ACCOMMODATION, ORGANISE AND SUPPORT MEETINGS AND HANDLING DIARY SYSTEMS
UNIT	2.7.1 Organize Business travel and accommodation
Learning Outcome	18. Be able to produce and collate travel documentation within an appropriate timescale
LO 18	
Credits assigned	1
Number of assessments used	1
Assessment Criteria	Assessment tools (Guidance)
1. Outline travel documentation and information to provide to the person who is travelling, and how to obtain these 2. Provide the organiser or traveller with an itinerary and the required documents in good time	Discussion (1 credit) 1. Learners are asked to identify the type of documents they should submit to the traveler.

NOTES

Discussion

- Documentation to be provided includes:
 - Itinerary
 - Hotel booking and confirmation
 - Other documentation needed for the meeting or event such as agenda, preparatory documents etc

Comments etc for assessors

WORK AREA CODE	2.7
WORK AREA TITLE	ORGANISE BUSINESS TRAVEL AND ACCOMMODATION, ORGANISE AND SUPPORT MEETINGS AND HANDLING DIARY SYSTEMS
UNIT	2.7.1 Organize Business travel and accommodation
Learning Outcome LO 19	19. Understand the importance of checking travel plans immediately prior to the journey
Credits assigned	1
Number of assessments used	1
Assessment Criteria	Assessment tools (Guidance)
1. Understand the importance of checking travel plans prior to the journey	Discussion (1 credit) Learners are asked to identify the reasons for which this is important, as well as the risks involved in case no final check is made.

NOTES

Discussion

- Reasons for which checking travel plans is important
 - Ensuring that all flights have been booked correctly and those travelers have been informed correctly
 - Double checking with travel agent/airline web site and confirming there are no changes published

Comments etc for assessors

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WORK AREA CODE	2.7
WORK AREA TITLE	ORGANISE BUSINESS TRAVEL AND ACCOMMODATION, ORGANISE AND SUPPORT MEETINGS AND HANDLING DIARY SYSTEMS
UNIT	2.7.2 Organize and support meetings
Learning Outcome	20.Be able to prepare for a meeting
LO 20	
Credits assigned	1
Number of assessments used	1
Assessment Criteria	Assessment tools (Guidance)
1. Explain the role of the person preparing a meeting 2. Describe the different types of meetings and their main features 3. Explain how to plan meetings that meet agreed aims and objectives 4. Explain how to identify suitable venues for different types of meetings 5. Describe the types of resources needed for different types of meetings 6. Confirm the budget 7. Invite attendees and confirm attendance 8. Make sure attendees' needs are met 9. Make sure equipment and layout is appropriate 10. Keep record of arrangements made and services used	Professional Discussion (1 credit) 1. Learners are asked to discuss the assessment criteria. They are also asked to identify any tools used to monitor the planning and organization of a meeting

NOTES

Professional Discussion

- Explain the role of the person preparing a meeting

Make sure that everything is up to standard, ensuring thus the effectiveness of the meeting

- Describe the different types of meetings and their main features

Team meeting, board of director meeting, customer meeting, meeting with external stakeholder etc. Some meeting may have the form of a presentation

- Explain how to plan meetings that meet agreed aims and objectives

Explain how to identify suitable venues for different types of meetings

Depending on:

- the style of the meeting (presentation etc),
 - the number of people attending,
 - the formality level of the meeting,
 - whether catering is needed
 - Any special equipment needed
- Describe the types of resources needed for different types of meetings

Projector and screen, video conferencing, notepads and pens (always), computer, speakers, etc

Confirm the budget with your supervisor

Invite attendees and confirm attendance

Make sure attendees' needs are met.

Keep record of arrangements made and services used

Comments etc for assessors

WORK AREA CODE	2.7
WORK AREA TITLE	ORGANISE BUSINESS TRAVEL AND ACCOMMODATION, ORGANISE AND SUPPORT MEETINGS AND HANDLING DIARY SYSTEMS
UNIT	2.7.2 Organize and support meetings
Learning Outcome	21. Be able to support a meeting
LO 21	
Credits assigned	2
Number of assessments used	2
Assessment criteria	Assessment tools (Guidance)
- Describe how to help the meeting organiser during the meeting - Attend to any requirements during the meeting as directed by the meeting organiser or participants	Professional Discussion (2 credits) - Learners are asked: - To describe any previous experiences on supporting meetings OR - To provide their perception on what supporting meetings means - To discuss on the assessment criteria

NOTES

Professional Discussion

Participants are expected to

1. To describe any previous experiences on supporting meetings OR
2. To provide their perception on what supporting meetings means
 1. Ensuring that the meeting runs smoothly
3. To discuss on the assessment criteria
 1. Describe how to help the meeting organiser during the meeting
 - a. Keep notes
 - b. Put notes on flipchart
 - c. Disseminate material
 1. Attend to any requirements during the meeting as directed by the meeting organiser or participants
 - d. Responding the needs of organiser or other participants e.g. need for copies, change room temperature, troubleshooting of equipment etc

Comments etc for assessors

WORK AREA CODE	2.7
WORK AREA TITLE	ORGANISE BUSINESS TRAVEL AND ACCOMMODATION, ORGANISE AND SUPPORT MEETINGS AND HANDLING DIARY SYSTEMS
UNIT	2.7.2 Organize and support meetings
Learning Outcome	22. Be able to complete actions required after a meeting
LO 22	
Credits assigned	1
Number of assessments used	1
Assessment Criteria	Assessment tools (Guidance)
1. Follow up actions to be completed after the meeting and do so in the agreed timescale 2. Explain the purpose of collecting and evaluating participant feedback from the meeting 3. Describe how to agree learning points to improve the organisation of future meetings	Professional Discussion (1 credit) 1. Learners are asked to discuss how they can monitor the actions that must be implemented after the completion of the meeting and to describe possible actions that must be performed

NOTES

Professional Discussion

- Possible actions:
 - Minutes preparation and dissemination
 - Send materials to meeting attendees
 - Handle logistics e.g. return borrowed equipment, arrange for payments, return equipment to the office, arrange for room cleaning (if applicable) etc
- How to monitor
 - Reminders in outlook or other program
 - Use of check list

Comments etc for assessors

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WORK AREA CODE	2.7
WORK AREA TITLE	ORGANISE BUSINESS TRAVEL AND ACCOMMODATION, ORGANISE AND SUPPORT MEETINGS AND HANDLING DIARY SYSTEMS
UNIT	2.7.3 Handling Diary Systems
Learning Outcome	23. Understand the different types of diary systems
LO 23	
Credits assigned	1
Number of assessments used	1 out of 2
Assessment Criteria	Assessment tools (Guidance)
1. Describe different types of diary systems 2. Identifying attributes of different diary systems 3. Identifying advantages and disadvantages of different diary systems 4. Identifying issues of accessibility and confidentiality of different diary systems	Professional Discussion (1 credit) 1. Participants will be asked to identify and describe different types of diary systems, as well as the advantages and disadvantages of each and the purpose of using them OR Evidence (1 credit) 2. Evidence may be supplied from the following resources: • diary

NOTES

Professional Discussion

Electronic diary systems (computer, telephone)

- you cannot always transfer
- corrections are easy
- you can synchronise different types of electronic diaries
- you can share with colleagues- issues of confidentiality

Paper based diary systems

- can take everywhere
- you cannot share with colleagues like computer base diary
- Not easy to make corrections
- More personal

Comments etc for assessors

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WORK AREA CODE	2.7
WORK AREA TITLE	ORGANISE BUSINESS TRAVEL AND ACCOMMODATION, ORGANISE AND SUPPORT MEETINGS AND HANDLING DIARY SYSTEMS
UNIT	2.7.3 Handling Diary Systems
Learning Outcome	24. Understand how to set up new diary entries
LO 24	
Credits assigned	1
Number of assessments used	1 out of 2
Assessment Criteria	Assessment tools (Guidance)
1. Explain how to set up new diary entries	Professional Discussion (1 credit) 1. Learners are asked to describe how they would set up a new diary entry OR Evidence (1 credit) 2. Evidence may be supplied from the following resources: diary

NOTES

Professional Discussion or evidence

Establish the purpose, date, time, attendees and location of a meeting/event, liaise with attendees as appropriate, make diary entries accurately and clearly and confirm final details of meeting/event to attendees

Comments etc for assessors

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WORK AREA CODE	2.7
WORK AREA TITLE	ORGANISE BUSINESS TRAVEL AND ACCOMMODATION, ORGANISE AND SUPPORT MEETINGS AND HANDLING DIARY SYSTEMS
UNIT	2.7.3 Handling Diary Systems
Learning Outcome	25. Understand how to handle requests from others for new diary entries
LO 25	
Credits assigned	1
Number of assessments used	1
Assessment Criteria	Assessment tools (Guidance)
1. Understand how to prioritise requests 2. Explain the purpose of trying to balance the needs of all those involved 3. Explain the purpose of communicating changes to those affected 4. Identify the details needed in order to handle the requests	Professional Discussion (1 credit) 1. Learners will need to discuss on the several assessment criteria provided

NOTES

Professional Discussion

Details are needed in order to handle requests:

- establish the amount of time required,
- location and purpose of meeting,
- check current diary commitments,
- make diary entries accurately and clearly and
- confirm suitability of proposed entry to originator of request

Comments etc for assessors

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WORK AREA CODE	2.7
WORK AREA TITLE	ORGANISE BUSINESS TRAVEL AND ACCOMMODATION, ORGANISE AND SUPPORT MEETINGS AND HANDLING DIARY SYSTEMS
UNIT	2.7.3 Handling Diary Systems
Learning Outcome	26. Be able to deal with proposed changes to existing diary entries
LO 26	
Credits assigned	1
Number of assessments used	1
Assessment Criteria	Assessment tools (Guidance)
1. Obtain information required for making the changes 2. Make entries accurately and clearly 3. Prioritise changes to entries 4. Record agreed changes in the diary 5. Identify and report the effects of any changes for existing entries 6. Solve problems occurred	Professional Discussion (1 credit) 1. Learners will discuss on the assessment criteria for this LO

NOTES

Professional Discussion

By:

- recording agreed changes in diary and
- delete previous entries and
- communicate agreed changes to those affected

Comments etc for assessors

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WORK AREA 2.8 DEMONSTRATE BASIC KNOWLEDGE OF ICT SKILLS

WORK AREA CODE	2.8
WORK AREA TITLE	DEMONSTRATE BASIC KNOWLEDGE OF ICT SKILLS
UNIT	2.8.1 Word-processing
Learning Outcome	27. Demonstrate ability in using Word Processing techniques at a basic level
LO 27	
Credits assigned	2
Number of assessments used	1 out of 2
Assessment Criteria	Assessment tools (Guidance)
1. Use appropriate techniques to enter text and other information accurately and efficiently 2. Select and use appropriate templates for different purposes 3. Identify when a range of editing tools are needed to amend document content text 4. Select and use appropriate techniques to format characters and paragraphs 5. Select and use appropriate page layouts to present and print documents	The following methods are recommended for the assessment of ICT user skills, knowledge and understanding: • e-assessment • knowledge tests • scenario-based assessment • portfolio of evidence taken from activities involving the use of word processing • witness testimony • professional discussion Suggested Assessment for EUPA E-Assessment (2 credits) 1. Participants will be given a document. They will be asked to create it OR Evidence (2 credits) 2. Portfolio of evidence taken from activities involving the use of word processing

NOTES

E - Assessment

- Learners are given a printed document of around 200-250 words and required to produce, save and print it.

Note: Partners may provide a document in their mother tongue.

Portfolio of evidence

- Learners may present documents they have created, that prove competence against assessment criteria

Comments etc for assessors

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WORK AREA CODE	2.8
WORK AREA TITLE	DEMONSTRATE BASIC KNOWLEDGE OF ICT SKILLS
UNIT	2.8.2 Spreadsheets
Learning Outcome	28. Demonstrate ability in designing and creating spread sheets at a basic level
LO 28	
Credits assigned	2
Number of assessments used	1 out of 2
Assessment Criteria	Assessment tools (Guidance)
1. Enter and edit numerical and other data accurately 2. Combine and link data across worksheets 3. Store and retrieve spreadsheet files effectively, in line with local guidelines and conventions where available 4. Select and use a range of appropriate functions and formulas to meet calculation requirements 5. Use a range of tools and techniques to analyse and manipulate data to meet requirements 6. Select and use appropriate tools and techniques to format spreadsheet cells, rows, columns and worksheets 7. Select and format an appropriate chart or graph 8. Select and use appropriate page layout to present information	The following methods are recommended for the assessment of ICT user skills, knowledge and understanding • e-assessment • knowledge tests • scenario-based assessment • portfolio of evidence taken from activities involving the use of word processing • witness testimony • professional discussion Suggested Assessment for EUPA E-Assessment (2 credits) 1. Participants will be given a spreadsheet (with some explanation on formulas). They will be asked to create it, format it and print it OR Evidence (2 credits) 2. Portfolio of evidence taken from activities involving the use of spreadsheets

NOTES

E - Assessment

- Learners are given a spreadsheet with approximately 8 columns and 10 rows and required to produce, save and print it.

Note: Partners may provide a spreadsheet in their mother tongue.

Portfolio of evidence

- Learners may present spreadsheets they have created, that prove competence against assessment criteria

Comments etc for assessors

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WORK AREA CODE	2.8
WORK AREA TITLE	DEMONSTRATE BASIC KNOWLEDGE OF ICT SKILLS
UNIT	2.8.3 Presentations
Learning Outcome LO 29	29. Demonstrate skills and knowledge to select and use a wide range of basic presentation software tools and techniques effectively to produce presentations that are non-routine or unfamiliar
Credits assigned	2
Number of assessments used	1 out of 2
Assessment Criteria	Assessment tools (Guidance)
1. Enter text and other information using layouts appropriate to type of information 2. Insert charts and tables into presentation slides 3. Store and retrieve presentation files effectively, in line with local guidelines and conventions where available 4. Identify what slide structure and themes to use 5. Select, change and use appropriate templates for slides 6. Select and use appropriate techniques to edit slides and presentations to meet ends 7. Select and use appropriate techniques to format slides and presentations 8. Describe how to present slides to meet needs and communicate effectively 9. Prepare slideshow for presentation	The following methods are recommended for the assessment of ICT user skills, knowledge and understanding • e-assessment • knowledge tests • scenario-based assessment • portfolio of evidence taken from activities involving the use of word processing • witness testimony • professional discussion Suggested Assessment for EUPA E-Assessment (2 credits) 1. Participants will be given a document. They will be asked to create it, format it and print it OR Evidence (2 credits) 2. Portfolio of evidence taken from activities involving the use of presentation software

NOTES

E - Assessment

- Learners are asked to develop a presentation on a topic of their selections

Note: Presentation may be in their mother tongue.

Portfolio of evidence

- Learners may present presentations they have created, that prove competence against assessment criteria

Comments etc for assessors

WORK AREA CODE	2.8
WORK AREA TITLE	DEMONSTRATE BASIC KNOWLEDGE OF ICT SKILLS
UNIT	2.8.4 Internet
Learning Outcome	30. Be able to use the world wide web to perform simple tasks
LO 30	
Credits assigned	2
Number of assessments used	1 out of 2
Assessment Criteria	Assessment tools (Guidance)
1. Load a web page by entering the URL 2. Find information with the used of search engines 3. Purchase goods or services through the internet	The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users: • e-assessment • knowledge tests • scenario-based assessment • portfolio of evidence taken from activities involving the use of word processing • witness testimony • professional discussion Suggested Assessment for EUPA E-Assessment (2 credits) 1. Participants will be asked to research for a specific topic, identify possible flights etc. OR Evidence (2 credits) 2. Portfolio of evidence taken from activities involving the use of presentation software

NOTES

E - Assessment

- Learners are asked to research on a topic of their selection

Note: Presentation may be in their mother tongue.

Portfolio of evidence

- Learners may describe their experience with using the internet for research purposes as well as for purchase of goods or services

Comments etc for assessors

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WORK AREA CODE	2.8
WORK AREA TITLE	DEMONSTRATE BASIC KNOWLEDGE OF ICT SKILLS
UNIT	2.8.5 Internet
Learning Outcome	31. Be able to use the Internet to send a simple email and use instant messaging as well as social networking programmes
LO 31	
Credits assigned	2
Number of assessments used	1 out of 2
Assessment Criteria	Assessment tools (Guidance)
1. Send an email and or message including attachments and priorities	The following methods are recommended for the assessment of IT user skills, knowledge and understanding of all IT Users: • e-assessment • knowledge tests • scenario-based assessment • portfolio of evidence taken from activities involving the use of word processing • witness testimony • professional discussion Suggested Assessment for EUPA E-Assessment (2 credits) 1. Participants will be asked to demonstrate ability for sending an email. OR Evidence (2 credits) 2. Portfolio of evidence taken from activities involving the use of email. This could include: • Printouts of some emails or viewing of learner mailbox

NOTES

E - Assessment

- Learners are asked to send a simple email on a topic of their selections

Note: Email may be in their mother tongue.

Portfolio of evidence

- Learners may describe their experience with sending emails for communicating with stakeholders etc

Comments etc for assessors

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