

**REPUBLIC OF KENYA**

**NATIONAL OCCUPATIONAL STANDARDS**

**FOR**

**OFFICE ASSISTANT**

LEVEL 4

**OS CODE:** **04150554A**

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# FOREWORD

The Provision of quality education and training is fundamental to the Government’s overall strategy for socio-economic development. Quality education and training contribute to achievement focused on Kenya’s development blueprint and sustainable development goals.

Reforms in the education and training sector are necessary for achievement of Kenya Vision 2030 and meeting the provisions the Constitution of Kenya. The education sector had to be aligned to the Constitution and this resulted in formulation of the Policy Framework for Reforming Education and Training (Sessional Paper No. 1 of 2019). A key feature of this policy is the change in the design and delivery of TVET training. The reforms include making TVET competency-based, developing the occupational standard in collaboration with industry, certifying learners based on demonstrated competence, and allowing multiple entry and exit points in TVET programs.

These reforms emphasize the role of industry as key collaborators in curriculum development to ensure it aligns with their competence needs. It is against this background that this Curriculum has been developed.

It is my conviction that this occupational standard will play a great role towards development of competent human resource for the Office Administration sector’s growth and sustainable development.

**PRINCIPAL SECRETARY**

**STATE DEPARTMENT FOR TVET**

**MINISTRY OF EDUCATION**

**PREFACE**

Kenya Vision 2030 aims to transform the country into a newly industrializing, middle-income country providing high quality life to all its citizens by the year 2030. Kenya intends to create a globally competitive and adaptive human resource base to meet requirements of a rapidly industrializing economy through life-long education and training. TVET has a responsibility of facilitating the process of inculcating knowledge, skills and worker behavior necessary for catapulting the nation to a globally competitive country, hence the paradigm shift to embrace Competency Based Education and Training (CBET).

CAP 210A and Sessional Paper No. 1 of 2019 on Reforming Education and Training in Kenya for Sustainable Development emphasized the need to reform curriculum development, assessment, and certification This called for a shift to CBET to address the mismatch between skills acquired through training and skills needed by industry as well as increase the global competitiveness of Kenyan labor force.

This curriculum has been developed in adherence to the Kenya National Qualifications Framework and CBETA standards and guidelines. The curriculum is designed and organized into Units of Learning with Learning Outcomes, suggested delivery methods, learning resources, and methods of assessing the trainee’s achievement. In addition, the units of learning have been grouped in modules to concretize the skills acquisition process and streamline upskilling.

I am grateful to all expert trainers and everyone who played a role in translating the Occupational Standards into this competency-based modular curriculum.

# ACKNOWLEDGEMENT

This curriculum has been designed for competency-based training and has independent units of learning that allow the trainee flexibility in entry and exit. In developing the curriculum, significant involvement and support was received from industry and various organizations.

I appreciate National Sector Skills Committee who enabled the development of this curriculum. I recognize with appreciation the role of the SSC in ensuring that competencies required by the industry are addressed in this curriculum.

I also thank all stakeholders in the office administration sector for their valuable input and all those who participated in the process of developing this curriculum.

I am convinced that this occupational standard will go a long way in ensuring that workers in construction sector will acquire competencies that will enable them perform their work more efficiently.

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# ABBREVIATIONS AND ACRONYMS

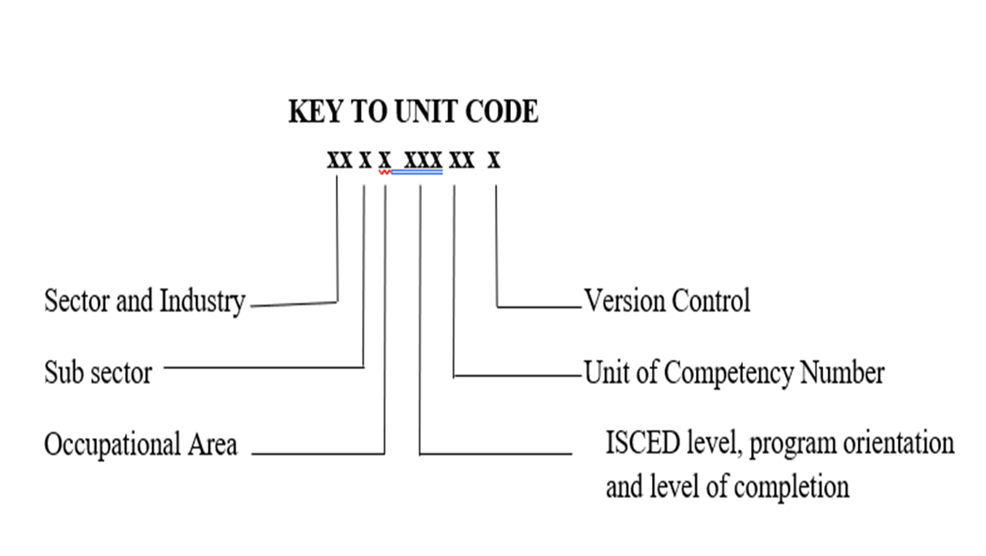
|  |  |  |
| --- | --- | --- |
| **ICT** |  | Information Communication  Technology |
| **PPE** |  | Personal Protective Equipment |
| **SSAC** |  | Sector Skills Advisory Committee |
| **TVET** |  | Technical and Vocational |

Education and Training

**TVET CDACC** TVET Curriculum Development

Assessment and Certification

Council



# OVERVIEW

Office Assistant Level 4 qualification consists of competencies that an individual must have to offer office assistance services. It comprises of handling office correspondences, office errands, customer care, coordinating facilities repairs and maintenance, Applying Shorthand Skills and Processing Office Documents.

Office Assistant Level 4 qualification include the following core units:

**COMMON UNITS OF COMPETENCY**

|  |  |
| --- | --- |
| 0413 351 03A | Undertake business communication |

**CORE UNITS OF COMPETENCY**

|  |  |
| --- | --- |
| **Unit of Competency Code** | **Unit of Competency Title** |
| 0415 351 09A | Handle Office Correspondence |
| 0415 351 10A | Handle Office Errands |
| 0415 351 11A | Handle Customer Care |
| 0415 351 12A | Introduction to Shorthand Skills 1 |
| 0415 351 13A | Introduction to Process office Documents 1 |
| 0415 351 14A | Handle Office Paper Records |
| 0415 351 15A | Coordinate Office Facilities and Maintenance |
| 0415 351 16A | Introduction to Shorthand Skills 2 |
| 0415 351 17A | Introduction to Process office Documents 2 |
| 0415 351 18A | Manage telephone calls |

# COMMON COMPETENCIES

**APPLY BUSINESS COMMUNICATION**

**UNIT CODE:** 0413 351 03A

**UNIT DESCRIPTION**

This unit specifies the competencies required to undertake business communication. It involves administering communication channels, implementing types of communication, implementing service charter, safeguarding confidentiality of information, coordinating communication on social media platforms, preparing workplace meeting and reports.

**ELEMENTS AND PERFORMANCE CRITERIA**

| **ELEMENT**  These describe the key outcomes which make up workplace function. | **PERFORMANCE CRITERIA**  These are assessable statements which specify the required level of performance for each of the elements.  ***Bold and italicized terms are elaborated in the Range*** |
| --- | --- |
| 1. Administer Communication channels | * 1. Communication processes are handled in line with the human resource manual on correspondence.   2. Principles of effective communication are applied as per the organisation policy   3. Channels of communication are administered as per the organisation policy   4. Factors to effective communication are selected in line with SOPs   5. Barriers to effective communication are identified in line with as per the organisation policy   6. Patterns of communication are identified as per the organization policy   7. Sources of Information are identified as per the organisation policy   8. Organization Policies are identified and applied in line with as per the organisation policy   9. Records are kept in line with the human resource manual on correspondence and as per the organisation policy |
| 1. Implement types of communication | * 1. Familiarize with organization record management policies where available.   2. Record management policies are initiated as per the organization procedures.   3. Records are sorted and classified in lines with the organization policy.   4. Records are indexed in line with the organization policy.   5. Records are stored in line with the organization policy.   6. Records back-up is created in line with as per the organization policy.   7. Records are appraised and obsolete records are disposed in line with the organization policy . |
| 1. Implement service charter | * 1. Familiarize with the organization service charter.   2. Emphases the Importance of service charter in line with the organisation policy.   3. Response to correspondences is done in line with the service charter.   4. Record retrieval is done in line with service charter. |
| 1. Safeguard confidentiality of information | * 1. Familiarize with the organization policy on confidentiality of information.   2. ***Physical securing*** of records and correspondences is done in line with organization policy   3. Monitor how records and correspondences in circulation are handled within the organization.   4. Information issecured as per the organisation policy of the Organisation   5. Sensitize employees onsafeguarding confidentialityof information and records as per the organization policy   6. Regular tracing of records and correspondences is done in line with the organization policy. |
| 1. Coordinate communication on social media platforms | * 1. Organization social media requirements are identified as per the organisation policy   2. Initiate development and review of social media policies and procedures in line with organisational objectives   3. Select the social media platforms that meet the needs of the organization.   4. Source for content, both internal and external, for use on social media platforms are handled as per the organisation policy   5. Respond to customers in timely manner directing them to relevant information as required according to social media policies and procedures.   6. Update of the social media account to maximize effectiveness as per the organisation policy   7. Enforce adherence to legal and ethical practices as per the organization policy.   8. Track social media activities using ***social media monitoring tools.***   9. Report the social media engagements to management for implementation in line with organisation policy |
| 1. Prepare work place meetings | * 1. Minute taking is defined as per the organization policy   2. Types of meetings are highlighted as per the organization policy   3. ***Structure of meetings*** are identified as per the organization policy |
| 1. Prepare workplace report | * 1. Report writing is defined as per the organization policy.   2. Importance of reports in human resource function is emphasized as per the organization policy.   3. Forms and types of reports are described as per the organization policy   4. Reports formats are identified as per the organization policy   5. Reports preparation is done as per the organization policy. |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environments and situations that will affect performance.

|  |  |
| --- | --- |
| **Variable** | **Range** |
| 1. Physical securing may include but not limited to: | * + Lock and key   + Reinforced storage   + Fireproofing   + Lockable cabinets   + Restricted access |
| 1. Social media monitoring tools may include but not limited to: | * + Twitter counter   + Hootsuite   + Klout   + Buzzlogix   + Digimind |
| 1. Structure of meetings may include but not limited to: | * + Notice   + Agenda   + Preparation of other relevant documents   + Minute formats |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to demonstrate the following skills:

* Communication
* Data analysis and presentation
* Listening
* Organizational
* Leadership
* Time management
* Conflict management and resolutions
* Budgeting
* Decision making
* Emotional intelligence
* Interpersonal Relations
* Crisis management
* Analytical skills
* Data analysis and presentation
* Public relations
* Negotiation
* Computer
* SOP
* Operations of the organization
* Emerging issues.
* Record management
* Reading

**Required Knowledge**

The individual needs to demonstrate knowledge and understanding of:

* Work place procedures
* Human resource procedures and manuals
* Record Management function
* Work Planning and documentation
* Dispute resolution process
* Legislations, policies and regulations
* Communication processes
* Negotiations
* Interpersonal relations
* ICT
* Emotional intelligence
* Social media use

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical aspects of  Competency | Assessment requires evidences that the candidate:   * 1. Handled organizational policies as per the organisation policy   2. Sorted correspondence and took necessary action as per the organisation policy   3. Maintain human resource records as per the organisation policy   4. Align response time to service charter as per the organisation policy   5. Safeguarded confidentiality of information as per the organisation policy   6. Legal and Ethical Issues in social media platforms as per the organisation policy   7. Managed communication on social media platforms as per the organisation policy   8. Prepared work place meetings as per the organisation policy   9. Prepared work place reports as per the organisation policy |
| 2. Resource Implications for competence certification | The following resources should be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place 3. Materials relevant to the proposed activity or tasks |
| 3. Method of assessment | Competency may be assessed through:   * 1. Written questions   2. Projects   3. Review of portfolios   4. Review of third-party workplace reports |
| 4. Context for assessment | Assessment may be done in the workplace or in a simulated workplace setting (assessment centers). |
| 5. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

# CORE COMPETENCIES

## HANDLE OFFICE CORRESPONDENCE

**UNIT CODE:** 0415 351 09A

**Unit Description**

This unit specifies competencies required to handle office mail. It includes handling incoming mail, handling outgoing mail, handling electronic correspondence and maintaining mail room equipment.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function | **PERFORMANCE CRITERIA**  These are assessable statements that specify the required level of performance for each of the elements.  ***(Bold and italicized terms are elaborated in the Range)*** |
| 1. Handle incoming mail | 1. ***Incoming mail*** is received as per organization’s mail management procedure 2. Incoming mail is recorded as per organization’s mail management procedure 3. Incoming mail is forwarded for action as per organization’s mail management procedure |
| 1. Handle outgoing mail | 1. ***Outgoing mail*** is received as per organization’s mail management procedure 2. Outgoing mail is recorded in the outgoing mail register as per organization’s mail management procedure 3. Mail envelopes are addressed based on organization’s mail management procedure 4. Postage stamps are affixed as per destination and weight 5. Outgoing mail is ***dispatched*** as per organization’s mail management procedure |
| 1. Handle   electronic correspondence | 1. ***Electronic*** ***correspondence*** is received based on organization’s electronic correspondence procedure 2. Electronic correspondence receipt is acknowledged as per organization’s electronic correspondence procedure 3. Electronic correspondence is shared for action as per organization’s electronic correspondence procedure 4. ***Physical correspondence*** is scanned as per organization’s electronic correspondence procedure 5. Scanned correspondence is shared as per organization’s electronic correspondence procedure |
| 1. Maintain mail room equipment | 1. Malfunctioning/damage/loss of mail room equipment is reported as per organization’s asset maintenance procedure 2. Mail room equipment use is controlled in line with organization’s asset maintenance procedure 3. Mail room equipment servicing record is maintained as per organization’s asset maintenance procedure |

**RANGE OF VARIABLES**

This section provides work environment and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| **VARIABLE** | **RANGE** |
| 1. Incoming mail may include but not limited to: | * 1. Personal mail   2. Official mail, etc. |
| 1. Outgoing mail may include but not limited to: | 1. Registered 2. Recorded 3. Legal 4. General correspondence, etc. |
| 1. Dispatched may include but not limited to: | Dispatching methods such as:   1. Post office 2. Hand delivery 3. Courier services, etc. |
| 1. Electronic correspondence may include but not limited to: | 1. E-mail 2. Chat box 3. Electronic memos 4. Electronic reports, etc. |
| 1. Physical correspondence may include but not limited to: | * 1. Incoming correspondence for e-circulation   2. Typeset correspondence for signatures, etc. |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to apply knowledge of:

* Accuracy
* Creativity
* Document management
* Mail handling
* Multitasking
* Prioritizing
* Time management

**Required Knowledge**

The individual needs to apply knowledge of the following:

* Organization customers
* Geographical location
* Office rules and regulations
* Organization structure
* Postal codes
* Service providers

**EVIDENCE GUIDE**

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the individual:   1. Recorded incoming mail as per organization’s mail management procedure 2. Recorded outgoing mail in outgoing mail register as per organization’s mail management procedure 3. Addressed mail envelopes based on organization’s mail management procedure 4. Affixed postage stamps as per destination and weight 5. Acknowledged receipt of electronic correspondence as per organization’s electronic correspondence procedure 6. Shared electronic correspondence for action as per organization’s electronic correspondence procedure 7. Scanned physical correspondence as per organization’s electronic correspondence procedure 8. Shared scanned correspondence as per organization’s electronic correspondence procedure 9. Reported malfunctioning/damage/loss of mail room equipment as per organization’s asset maintenance procedure 10. Maintained mail room equipment servicing record as per organization’s asset maintenance procedure |
| 1. Resource Implications | The following resources should be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place 3. Materials relevant to the proposed activity or tasks |
| 1. Methods of assessment | Competency may be assessed through:  3.1 Written tests   * 1. Work based assignment  1. Third party reports |
| 1. Context of assessment | Assessment may be done in the workplace or in a simulated workplace setting (assessment centers). |
| 1. Guiding information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

## HANDLE OFFICE ERRANDS

**UNIT CODE:** 0415 351 10A

**Unit Description**

This unit covers the competencies required to handle office errands. It involves delivering, collecting organization’s documents, purchasing office supplies and maintaining evidence of deliveries and purchases done.

This standard applies in business industry.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the **key outcomes** which make up **workplace function** | **PERFORMANCE CRITERIA**  These are assessable statements that specify the required level of performance for each of the elements    ***(Bold and italicized terms are elaborated in the Range)*** |
| 1. Deliver office documents | 1.1 ***Documents*** to be delivered are collected, sorted and recorded as per workplace policy  1.2 Cheques for banking are collected and recorded as per workplace policy.  1.3 A delivery plan is developed based on destinations of delivery.  1.4 Documents that require urgent delivery are given priority as per workplace policy |
| 1. Collect office documents | 2.1 Documents to be collected are identified and recorded as per workplace policy.  2.2 A collection plan is developed based on collection destinations.  2.3 Documents that require urgent collection are given priority as per workplace policy. |
| 1. Purchase office supplies | 1. List of ***office items*** to be purchased is developed based on requisitions as per workplace policy. 2. A mini budget for purchases is prepared in line with the purchase list as per workplace policy. 3. Office items are purchased based on list of purchases. 4. Purchased office items are recorded, sorted and distributed based on user requisitions. 5. Purchased items are stored based on their storage requirements and workplace policy. 6. Office supplies stock levels are monitored as per workplace policy. 7. Office cashbook is maintained as per workplace policy. |
| 1. Maintain evidence of deliveries and purchases done | 1. Daily deliveries are recorded as per workplace policy. 2. ***Transaction evidence documents*** are filed as per workplace policy. 3. Expenditure surrender is done as per workplace policy. 4. Unsuccessful deliveries are reported, recorded and filed as per workplace policy. |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environments and situations that will affect performance.

|  |  |
| --- | --- |
| **Variables** | **Range** |
| 1. Documents include but not limited to: | * Letters * Cheques * Publications * Minutes * Memos |
| 1. Office items include but not limited to: | * Stationery * Tea items * Refreshments * Office tools * Office equipment |
| 1. Transaction evidence documents include but not limited to: | * Receipts * Banking slip * Delivery notes * Stamped copies of letters |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to demonstrate the following skills:

* Communication
* Basic computer
* Interpersonal
* Organizational
* Operating basic office tools and equipment
* Decision making
* Analytical
* Numeracy
* Time management

**Required Knowledge**

The individual needs to demonstrate knowledge of:

* Basic computer operations
* Communication
* Time management
* Record keeping
* Planning
* Organizing
* Book keeping
* Map reading
* Budgeting
* Numeracy

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |  |
| --- | --- | --- |
|  | * + - 1. Critical aspects of competency | Assessment requires evidence that the individual:    1 .1 Developed effective collection and delivery plans  1 .2 Prepared accurate mini budgets for office purchases |
|  | * + - 1. Resource   Implications | The following resources should be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place    1. Materials relevant to the proposed activity or tasks |
|  | * + - 1. Methods of assessment | Competency may be assessed through:  3.1 Written tests   * 1. Work based assignment   3.3 Third party reports |
|  | 1. Context of assessment | Assessment may be done in the workplace or in a simulated workplace setting (assessment centers). |
|  | 1. Guiding information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**MANAGE CUSTOMER CARE RELATIONS**

**UNIT CODE:** 0415 351 11A

**Unit Description**

This unit describes the competencies required to manage front office operations. It involves maintaining office etiquette, maintaining office reception area, handling organization visitors, maintaining official diary, handling official appointments and maintaining clients’ records.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function | **PERFORMANCE CRITERIA**  These are assessable statements that specify the required level of performance for each of the elements.  **(Bold and italicized terms are elaborated in the Range.)** |
| 1. Maintain office etiquette | 1. ***Professional conduct*** is adhered to as per organizational policies 2. Time is managed as per organizational procedures 3. Team work is exercised as per workplace procedures 4. Conflicts are handled based on workplace policy 5. Office technology is applied appropriately in line with organization policy 6. Self-orientation is updated as per workplace procedures |
| 1. Maintain office reception area | 1. Reception area is laid out as per organization’s guidelines 2. Reception area is ***landscaped*** as per workplace policy 3. Reception area ***physical environment*** is maintained as per OSHA 4. Reception area ***signage*** is maintained as per organization’s policy 5. Reception area equipment is maintained based on workplace guidelines |
| 1. Handle organization visitors | 1. Visitors are received as per organizational procedures 2. ***Visitors’ needs*** are identified and recorded as per organizational procedures 3. Visitors’ needs are attended as per organizational procedures 4. Visitors’ enquiries are received as per organizational procedures 5. Visitors’ enquiries are analyzed as per organizational procedures 6. Visitors’ enquiries are acted upon based on workplace policy 7. ***Entertainment resources*** are provided as per organization’s hospitality procedures 8. Entertainment resources are maintained as per organization’s guidelines 9. Entertainment resources are upgraded as per technological advancements and evolving trends in entertainment 10. ***Reference materials*** are maintained as per organization’s guidelines 11. Visitors’ feedback is recorded as per workplace procedures |
| 1. Maintain official diary | 1. Official diary is acquired as per workplace procedures 2. Official ***diary information*** is received as per workplace procedures 3. Official diary information is recorded as per organization’s correspondence procedures 4. Recorded diary information approval is sought as per organizational procedures 5. Recorded diary information is updated based on organizational procedures 6. Official diary information is harmonized in line with organization’s guidelines 7. Official diary information is scheduled based on organization’s calendar management and time allocation procedures 8. The official diary is safeguarded as per organization’s communication procedures |
| 1. Handle official appointments | * 1. Categories of ***official appointments*** are identified as per organizational procedures   2. Official appointments are recorded as per organizational procedures   3. Official appointments approval is sought as per organizational procedures   4. Official appointments are confirmed to the client based on organizational procedures   5. Official appointments are booked as per organizational procedures   6. Official appointments reminder is done as organizational procedures |
| 1. Maintain client’s records | 6.1 Clients’ register is created as per organization’s records  management guidelines  6.2 Clients’ details are recorded as per organization’s records management details  6.3 Clients’ databank is created as per organization’s  databank management guidelines  6.4 Clients’ records are updated based on organization’s  records management guidelines  6.5 Clients’ records are maintained based on organization’s  records management guidelines  6.6 Clients’ records are safeguarded as per Personal Data  Protection Act |

**RANGE OF VARIABLES**

This section provides work environment and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| **VARIABLE** | **RANGE** |
| 1. Professional conduct includes but not limited to: | 1. Professional appearance e.g. grooming, personal hygiene, clothing, footwear, accessories and jewelries, etc. 2. Professional communication e.g. language, tone. Respect, courtesy, etc. |
| 1. The landscape may include but not limited to: | * 1. Flowers   2. Aquarium   3. Stone carvings   4. Fountain   5. Wall hanging decors   6. Floor coverings |
| 1. Physical environment includes but not limited to: | 1. Ventilation 2. Lighting 3. Temperature 4. Cleanliness 5. Tidiness 6. Workplace organization 7. Safety, etc. |
| 1. Signage may include but not limited to the following: | * 1. Fire exit   2. Slippery floor   3. No smoking   4. Washroom, etc. |
| 1. Visitors' needs may include but not limited to: | 1. Accessibility 2. Special needs, etc. |
| 1. Entertainment resources may include but not limited to: | 1. Magazines 2. TVs 3. Newspapers 4. Water dispensers 5. Brochures 6. Organization newsletters, etc. |
| 1. Reference materials may include but not limited to: | 1. Visitor log book 2. Organization chart 3. Service Charter, etc. |
| 1. Diary information may include but not limited to the following: | * 1. Executive’s personal commitments   2. Appointments   3. Invitations, etc. |
| 1. Official appointments include but not limited to: | * 1. Scheduled appointment   2. Without appointment   3. Ad hoc appointment, etc. |

**REQUIRED SKILLSAND KNOWLEDGE**

**Required Skills:**

* Analytical
* Communication
* Control
* Customer service
* Decision making
* Flexibility
* ICT skills
* Interpersonal relations
* Listening
* Multitasking
* Negotiation
* Organization
* Photocopying
* Planning
* Prioritizing
* Problem-solving
* Scheduling
* Self-motivation
* Shorthand
* Teamwork
* Telephone etiquette
* Time management
* Typing
* Writing

**Required knowledge:**

The individual needs to apply knowledge of:

* Business communication
* Cleanliness
* Good grooming
* Customer care
* Customer knowledge
* Customer service
* Document processing
* Human relations
* Landscaping
* Organizational information, e.g., structure, mandate functions, core values, vision, mission
* Office Layout
* Record keeping
* Reprographic
* Signage
* Sources of information
* Dealing with people with disabilities

**EVIDENCE GUIDE**

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | ***Assessment requires evidence that the individual:***   1. Adhered to professional conduct as per organizational policies 2. Managed time as per organizational procedures 3. Laid out reception area as per organization’s guidelines 4. Landscaped reception area as per workplace policy 5. Maintained reception area physical environment as per OSHA 6. Maintained reception area signage as per organization’s policy 7. Maintained reception area equipment based on workplace guidelines 8. Received visitors as per organizational procedures 9. Attended to visitors’ needs as per organizational procedures 10. Analyzed Visitors’ enquiries as per organizational   procedures   1. Acted upon visitors’ enquiries based on workplace   policy   1. Provided entertainment resources as per   organization’s hospitality procedures   1. Recorded visitors’ feedback as per workplace procedures 2. Received official diary information as per workplace procedures 3. Recorded official diary information as per organization’s correspondence procedures 4. Sought approval of recorded diary information as per the organizational procedures 5. Harmonized official diary information in line with organization guidelines 6. Scheduled official diary information based on organization’s calendar management and time allocation procedures 7. Recorded official appointments as per organizational procedures 8. Sought official appointments approval as per organizational procedures 9. Booked official appointments as per organizational procedures 10. Created clients’ databank as per organization’s databank management guidelines 11. Created clients’ register as per organization’s records management guidelines 12. Recorded clients’ details as per organization’s records management guidelines |
| 1. Resource Implications | The following resources should be provided:   1. Access to relevant workplace or appropriately simulated environment where assessment can take place 2. Materials relevant to the proposed activity or tasks |
| 1. Methods of Assessment | Competency in this unit may be assessed through:  Practical   * 1. Practical   2. Projects   3. PoE evaluation   4. Third party reports   5. Written tests |
| 1. Context of Assessment | The competency may be assessed in a workplace or a simulated workplace |
| 1. Guidance information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**INTRODUCTION TO SHORTHAND SKILLS 1**

**UNIT CODE: 0415 351 12A**

**Unit Description**

This unit covers competencies required to apply shorthand skills. It involves consolidating shorthand and writing principles.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function | **PERFORMANCE CRITERIA**  These are assessable statements that specify the required level of performance for each of the elements.  **(Bold and italicized terms are elaborated in the Range.)** |
| 1. Consolidate shorthand and writing principles. | 1. ***Shorthand principles*** are applied based on Pitman New Era Shorthand from unit 1-3 2. ***Shorthand symbols*** are identified based on shorthand principles 3. Word lists, sentences, phrases, intersections, and short forms are drilled in line with shorthand principles 4. Dictation is established as per shorthand principles at 30WPM 5. Speed reading skills from plates and own notes are established based on shorthand principles 6. Transcription and proof-reading skills are applied in line with shorthand principles |

**RANGE OF VARIABLES**

This section provides work environment and conditions to which performance criteria apply. It allows for different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| **VARIABLE** | **RANGE** |
| 1. Shorthand principles may include but not limited to: | 1. Positioning 2. Penmanship e.g. dark strokes, light strokes, stroke direction, etc. |
| 1. Shorthand symbols may include but not limited to: | 1. Strokes/consonants 2. Outlines 3. Dots 4. Dashes 5. Syllables, etc. |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes skills and knowledge required for this unit of competency

**Required Skills**

The individual needs to apply the following skills:

* Reading
* Listening
* Pronunciation
* Writing
* Penmanship
* Typing
* Proofreading

**Required knowledge**

The individual needs to apply knowledge of the following:

* Shorthand principles
* Writing Principles
* Penmanship principles
* Digital literacy
* Spoken English - pronunciation
* Written English – grammar, punctuation, and spelling

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with performance criteria, required skills, knowledge, and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires that the individual:   1. Applied shorthand principles based on Pitman New Era Shorthand FROM UNIT 1-3 2. Drilled word lists, sentences, phrases, intersections and short forms in line with shorthand principles 3. Applied transcription and proofreading skills in line with shorthand principles |
| 1. Resource implications | The following resources should be provided:  2.1 Access to relevant workplace or appropriately  simulated environment where assessment can  take place   * 1. Materials relevant to the proposed activity or tasks   2. Materials relevant to the proposed activity or tasks |
| 1. Methods of assessment | Competency in this unit may be assessed through:  3.1 Practical  3.2 Projects  3.3 PoE evaluation  3.4 Third party reports  3.5 Written tests |
| 1. Context of assessment | The competency may be assessed in a workplace or a simulated workplace |
| 1. Guiding information for Assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

## INTRODUCTION TO PROCESS OFFICE DOCUMENTS 1

**UNIT CODE:** 0415 351 13A

**Unit Description**

This unit covers competencies required to process office documents. It involves applying keyboard skills, interpreting office instructions and preparing office manuscripts.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function | **PERFORMANCE CRITERIA**  These are assessable statements that specify the required level of performance for each of the elements.  ***(Bold and italicized terms are elaborated in the Range)*** |
| 1. Apply Keyboard skills | 1. ***QWERTY*** keyboard layout is interpreted based on keyboard manual 2. Posture and hand positioning is applied based on keyboard layout 3. ***Keyboard typing skills*** are applied based on keyboard layout |
| 1. Interpret office instructions | * 1. ***Office instructions*** are received as per workplace procedures   2. Office instructions are recorded in line with workplace procedures   3. ***Typing techniques*** are applied based on document processing techniques   4. Office instructions are effected as per workplace procedures |
| 1. Prepare office manuscripts | * 1. Formatting of ***manuscript*** is carried out in line with document processing techniques   2. Office manuscripts are produced based on document processing techniques   3. Copies of office manuscripts are filed as per organization’s filing system |

**RANGE OF VARIABLES**

This section provides work environment and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| **VARIABLE** | **RANGE** |
| 1. Qwerty keyboard layout includes but not limited to: | * 1. Functional keys e.g. F1, F2, F3, etc   2. Numerical keys e.g. 1, 2, 3, =, etc   3. Alphabetical keys e.g. ASDF, etc   4. Navigation keys e.g. caps lock, shift key, etc |
| 1. Keyboard typing skills include but not limited to: | * 1. Touch typing   2. Blind typing   3. Hand and peck typing |
| 1. Office instructions may include but not limited to: | * 1. Font style e.g. Times New Romans, Calibri, etc.   2. Font size, e.g. 12, 14, 16, etc.   3. Style instructions e.g. shoulder headings, paragraph headings, hanging paragraphs, side headings, displaying and in setting numbered/bulleted items |
| 1. Typing techniques may include but not limited to: | * 1. Typing speed   2. Accuracy   3. Ergonomics   4. Keyboard shortcuts, etc. |
| 1. Formatting include but not limited to: | * 1. Bold   2. Italic   3. Underline   4. Left-alignment   5. Right-alignment   6. Centering   7. Block   8. Indented   9. Justification   10. Page size   11. Page margins   12. Page borders, etc. |
| 1. Manuscripts may include but not limited to: | * 1. Article extracts   2. Research manuscripts   3. Speeches   4. Technical manuscripts, etc. |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to apply the following skills:

* Listening
* Writing
* Telephone etiquette
* Organization
* Interpreting
* Binding skills
* Photocopying
* Scanning
* Typesetting

**Required knowledge**

The individual needs to apply knowledge of the following:

* Digital literacy
* Reprographic
* Business communication
* Public relations
* Document processing

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, and range

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the individual:   1. Styling instructions 2. Applied typing techniques based on document processing techniques 3. Effected office instructions as per workplace procedures |
| 1. Resource implications | The following resources should be provided:   1. Access to relevant workplace or appropriately simulated environment where assessment can take place 2. Appropriately simulated environment where assessment can take place 3. Materials relevant to the proposed activity or tasks |
| 1. Methods of assessment | Competency in this unit may be assessed through:   1. Practical 2. Projects 3. PoE evaluation 4. Third party reports 5. Written tests |
| 1. Context of assessment | The competency may be assessed in a workplace or a simulated workplace |
| 1. Guiding information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

## MAINTAIN OFFICE PAPER RECORDS

**UNIT CODE:** 0415 351 14A

**Unit Description**

This unit covers the competencies required to maintain office paper records. It involves creating clients’ files, identifying and retrieving files for use, monitoring file movement and updating file records. This standard applies in business industry.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the keyoutcomes which make up workplace function | **PERFORMANCE CRITERIA**  These are assessable statements that specify the required level of performance for each of the elements.    ***(Bold and italicized terms are elaborated in the Range)*** |
| 1. Create   clients’ files | 1. ***Documents*** from new clients are received as per workplace policy 2. Client’s file is created and classified (coded) as per workplace filing system 3. Clients’ document is filed as per workplace policy 4. A list of created files is developed and maintained as per workplace policy |
| 1. Identify and retrieve files | 1. Files to be acted upon are searched and retrieved based on filing system and records management policy 2. Files release register is established and maintained as per workplace policy 3. Retrieved files are recorded and released as per workplace policy |
| 1. Monitor   file  movement | 1. File movement registers are created and maintained as per workplace policy 2. Movement of office files is monitored as per workplace policy 3. Files that have been cleared with are returned and restored for reuse as per workplace policy 4. Data privacy and preservation of the file are guarded as per workplace policy |
| 1. Update file records | 1. File information for update is received and recorded as per workplace policy 2. Existing file records are updated as per workplace policy 3. Files are archived as per workplace policy 4. Office records report is prepared as per workplace policy. |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environments and situations that will affect performance.

|  |  |
| --- | --- |
| **Variables** | **Range** |
| 1. Documents include but not limited to: | * Letters * Cheques * Publications * Minutes * Memos |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to demonstrate the following skills:

* Communication
* Basic computer
* Interpersonal
* Organizational
* Operating basic office tools and equipment
* Decision making
* Analytical
* Numeracy
* Time management

**Required Knowledge**

The individual needs to demonstrate knowledge of:

* Basic computer operations
* Communication
* Time management
* Record keeping
* Planning
* Organizing
* Book keeping
* Map reading
* Budgeting
* Numeracy

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |  |
| --- | --- | --- |
|  | 1. Critical aspects of competency | Assessment requires evidence that the individual:  **1.1** Ability to receive and handle client documents accurately in accordance with workplace policies and procedures.  **1.2** Competence in creating, coding/classifying, and filing new client files using the approved workplace filing system.  **1.3** Capability to maintain a systematic and updated list of created files for tracking and accountability purposes.  **1.4** Skill in retrieving and releasing files efficiently based on organizational filing and records management systems.  **1.5** Maintenance of a file release register and ensuring all released files are recorded according to workplace policy.  **1.6** Monitoring and tracking of file movements through registers to prevent loss or misplacement.  **1.7** Ensuring that cleared files are returned, restored, and preserved properly for future use. |
|  | 1. Resource   Implications | The following resources should be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place 3. Materials relevant to the proposed activity or tasks |
|  | 1. Methods of assessment | Competency may be assessed through:   * 1. Written questions   2. Projects   3. Review of portfolios   4. Review of third-party workplace reports |
|  | 1. Context of assessment | Assessment may be done in the workplace or in a simulated workplace setting (assessment centers). |
|  | 1. Guiding information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

## COORDINATE OFFICE REPAIRS AND MAINTENANCE

**UNIT CODE:** 0415 351 15A

**Unit Description**

This unit covers the competencies required to coordinate office facilities repairs and maintenance activities. It involves planning and overseeing facility repairs and maintenance, maintaining office hygiene and managing office keys movement. This standard applies in business industry.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the keyoutcomes which make up workplace function | **PERFORMANCE CRITERIA**  These are assessable statements that specify the required level of performance for each of the elements.    ***(Bold and italicized terms are elaborated in the Range)*** |
| 1. Plan and oversee facility repairs and maintenance | 1.1 Areas/items that require repairs are identified based on the workplace policy  1.2 A report on areas to be repaired/ maintained is prepared and documented as per workplace policy  1.3 Schedule for repair and maintenance works is prepared based on availability of resources and workplace policy  1.4 Repair works are supervised and records maintained in line with workplace policy  1.5 Ensure OSHA procedures are observed as per legal requirement  1.6 Work quality is assessed based on agreed terms of service  1.7 Repaired/maintained items are restored to users as per workplace policy  1.8 Report on repairs and maintenance activities is prepared and documented  as per workplace policy |
| 1. Maintain   office hygiene | 1. Office premise cleaning schedule is prepared as per workplace policy. 2. **Cleaning tools and equipment** are obtained based on surfaces to be cleaned as per workplace policy   2.3 ***Cleaning products and supplies*** are obtained based on surfaces to be cleaned as per workplace policy  2.4 Cleaning is done in line with workplace policy  2.5 Work stations are arranged and restored to order as per workplace policy  2.6 Public areas of premises are cleaned as per workplace policy  2.7 Ensure occupational safety and health procedures are observed as per legal requirement  2.8 Sanitation facilities are cleaned and maintained as per workplace policy  2.9 Cleaning materials, equipment, detergents and reagents are stored as per workplace policy |
| 1. Manage keys movement | 3.1 Keys are labelled in line with the workplace policy  3.2 Keys are recorded and distributed according to the workplace policy  3.3 Damaged and /or lost keys are reported, recorded and replaced as per workplace policy |

**RANGE**

This section provides work environments and conditions to which the performance criteria apply. It allows for different work environments and situations that will affect performance.

|  |  |
| --- | --- |
| **Variables** | **Range** |
| 1. Cleaning tools and equipment Include but not limited to: | * Brooms * Mops * Buckets * Hoovers * Vacuum cleaners * Dust pans * Brushes |
| 2. Cleaning products and supplies Include but not limited to: | * Disinfectants * Detergents |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes the skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to demonstrate the following skills:

* Communication
* Computer
* Interpersonal
* Organizational
* Operating basic office tools and equipment
* Decision making
* Housekeeping

**Required Knowledge**

The individual needs to demonstrate knowledge of:

* Basic principles of facilities repair and maintenance
* Basic computer operations
* Communication
* Time management
* Record keeping
* Basic Mathematics
* Store keeping
* Housekeeping
* Occupation health and safety procedures
* Planning and organizing
* Basic security

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

|  |  |
| --- | --- |
| 1. Critical aspects of competency | Assessment requires evidence that the individual:   1. Identified and recorded areas and items requiring repairs and maintenance 2. Prepared effective and efficient repair and maintenance work schedules 3. Supervised repair and maintenance work effectively 4. Demonstrated understanding of occupational safety and health procedures 5. Demonstrated ability to maintain a clean office environment 6. Restored repaired items to users promptly 7. Prepared and documented report on repairs and maintenance activities 8. Demonstrated understanding of cleaning principles and procedures 9. Stored cleaning tools, detergents and equipment appropriately 10. Marked, recorded and distributed office keys appropriately |
| 1. Resource Implications | The following resources should be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place 3. Materials relevant to the proposed activity or tasks |
| 1. Methods of assessment | Competency may be assessed through:   1. Written tests 2. Observation 3. Oral questioning 4. Work based assignment 5. Third party report |
| 1. Context of assessment | Assessment may be done in the workplace or in a simulated workplace setting (assessment centers). |
| 1. Guiding information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

## INTRODUCTION TO SHORTHAND SKILLS 2

**UNIT CODE:** 0415 351 16A

**Unit Description**

This unit covers competencies required to apply shorthand skills. It involves developing vocabulary extension,

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function | **PERFORMANCE CRITERIA**  These are assessable statements that specify the required level of performance for each of the elements.  **(Bold and italicized terms are elaborated in the Range.)** |
| 1. Develop vocabulary extension | * 1. Vocabularies from different sources are applied based on shorthand principles.   2. New words, phrases, short forms, intersections, and sentences are identified as per shorthand principles.   3. New outlines are drilled and mastered in line with ***shorthand principles*** from unit 4 &5   4. Speed reading from own notes is done based on shorthand principles at 40WPM   5. Proof-reading is done in line with shorthand principles   6. Shorthand notes are transcribed as per shorthand principles   7. Shorthand notes are printed based on shorthand principles |

**RANGE OF VARIABLES**

This section provides work environment and conditions to which performance criteria apply. It allows for different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| **VARIABLE** | **RANGE** |
| 1. Shorthand principles may include but not limited to: | * 1. Positioning   2. Penmanship e.g. dark strokes, light strokes, stroke direction, etc. |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes skills and knowledge required for this unit of competency

**Required Skills**

The individual needs to apply the following skills:

* Reading
* Listening
* Pronunciation
* Writing
* Penmanship
* Typing
* Proofreading

**Required knowledge**

The individual needs to apply knowledge of the following:

* Shorthand principles
* Writing Principles
* Penmanship principles
* Digital literacy
* Spoken English - pronunciation
* Written English – grammar, punctuation, and spelling

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with performance criteria, required skills, knowledge, and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires that the individual:   * 1. New words, phrases, short forms, intersections, and sentences are identified as per shorthand principles.   2. New outlines are drilled and mastered in line with shorthand principles from unit 4 &5   3. Speed reading from own notes is done based on shorthand principles at 40WPM |
| 1. Resource implications | The following resources should be provided:   1. Access to relevant workplace where assessment can take place 2. Appropriately simulated environment where assessment can take place 3. Materials relevant to the proposed activity or tasks |
| 1. Methods of assessment | Competency in this unit may be assessed through:  3.1 Practical  3.2 Projects  3.3 POE evaluation  3.4 Third party reports  3.5 Written tests |
| 1. Context of assessment | Assessment may be done in the workplace or in a simulated workplace setting (assessment centers). |
| 1. Guiding information for Assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

## INTRODUCTION TO PROCESS OFFICE DOCUMENTS 2

**UNIT CODE:** 0415 351 17A

**Unit Description**

This unit covers competencies required to process office documents. It involve Prepare office manuscripts and producing business letters

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function | **PERFORMANCE CRITERIA**  These are assessable statements that specify the required level of performance for each of the elements.  ***(Bold and italicized terms are elaborated in the Range)*** |
| 1 Prepare office manuscripts | * 1. Formatting of manuscript is carried out in line with document processing techniques   2. Office manuscripts are produced based on document processing techniques   3. Copies of office manuscripts are filed as per organization’s filing system |
| 1. Produce business letters | * 1. Base letter template is typed as per workplace procedure***s*** One Page Letter   2. Mail merging of business letters is carried out as per document processing techniques   3. Addressing of envelopes is carried out based on workplace procedures   4. ***Mailable*** business letters are produced in line with document processing techniques at 30WMP   5. Copies of business letters are filed in line with organization’s filing system |

**RANGE OF VARIABLES**

This section provides work environment and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| **VARIABLE** | **RANGE** |
| 1. Formatting include but not limited to: | * 1. Bold   2. Italic   3. Underline   4. Left-alignment   5. Right-alignment   6. Centering   7. Block   8. Indented   9. Justification   10. Page size   11. Page margins   12. Page borders, etc. |
| 1. Mailable may include but not limited to: | * 1. High-quality paper   2. Standard paper size   Print e.g. font style and size, etc. |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to apply the following skills:

* Listening
* Writing
* Telephone etiquette
* Organization
* Interpreting
* Binding skills
* Photocopying
* Scanning
* Typesetting

**Required knowledge**

The individual needs to apply knowledge of the following:

* Digital literacy
* Reprographic
* Business communication
* Public relations
* Document processing

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, and range

|  |  |
| --- | --- |
| 1.Critical Aspects of Competency | Assessment requires evidence that the individual:   * 1. Typed base letter template as per workplace procedures   2. Carried out mail merging of business letters as per document processing techniques   3. Carried out addressing of envelopes based on workplace procedures   4. Produced mailable business letters in line with document processing techniques |
| 1. Resource implications | The following resources should be provided:   * 1. Access to relevant workplace where assessment can take place   2. Appropriately simulated environment where assessment can take place   3. Materials relevant to the proposed activity or tasks |
| 1. Methods of assessment | Competency in this unit may be assessed through:   1. Practical 2. Projects 3. POE evaluation 4. Third party reports 5. Written tests |
| 1. Context of assessment | The competency may be assessed in a workplace or a simulated workplace |
| 1. Guiding information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |

**MANAGE TELEPHONE CALLS**

**UNIT CODE:** 0415 351 18A

**Unit Description**

This unit covers competencies required to manage telephone calls. It involves handling telephone calls, maintaining caller register, and maintaining communication equipment.

**ELEMENTS AND PERFORMANCE CRITERIA**

|  |  |
| --- | --- |
| **ELEMENT**  These describe the key outcomes which make up workplace function | **PERFORMANCE CRITERIA**  These are assessable statements that specify the required level of performance for each of the elements.  ***(Bold and italicized terms are elaborated in the Range)*** |
| 1. Handle telephone calls | 1. ***Incoming calls are answered*** based on organization’s communication policy 2. Incoming calls are ***assessed*** as per organization’s communication policy 3. Outgoing calls are made based on organization’s communication policy 4. Telephone messages are recorded based on organization’s communication policy 5. ***Call options*** are acted upon as per organization’s communication policy |
| 1. Maintain caller register | 1. ***Caller details*** are recorded based on organization’s records management policy 2. Action on caller’s subject is recorded as per organization’s records management policy 3. Confidentiality of information in the caller register is preserved based on organization’s records management policy 4. Mechanism of accessing caller register is implemented as per organization’s records management policy |
| 1. Maintain communication equipment | 1. ***Communication equipment*** malfunction is reported based on organization’s asset and maintenance procedure 2. Communication equipment are safely used based on organization’s asset and maintenance procedure 3. Communication equipment are safely cleaned as per organization’s cleaning and maintenance procedure 4. Communication equipment are safely stored in line with organization’s asset and maintenance procedure |

**RANGE OF VARIABLES**

This section provides work environment and conditions to which performance criteria apply. It allows for different work environment and situations that will affect performance.

|  |  |
| --- | --- |
| **VARIABLE** | **RANGE** |
| 1. Incoming calls are answered may include but not limited to: | 1. Telephone etiquette  * Identification * Tone * Greetings * Courtesy * Diplomacy * Professionalism * Promptness, etc. |
| 1. Assessed may include but not limited to: | * 1. Assess identification of the caller   2. Assess importance of the call   3. Assess urgency of the call   4. Assess relevance of the call, etc. |
| 1. Call options may include but not limited to: | * 1. Call routing   2. Call forwarding   3. Voicemail, etc. |
| 1. Caller details may include but not limited to: | * 1. Caller’s name   2. Contact information   3. Date and time of the call   4. Reason for call, etc. |
| 1. Communication equipment may include but not limited to: | 1. Telephone 2. Computer 3. Mobile phones 4. VoIP phones 5. Headsets 6. Videoconferencing equipment 7. Intercom systems, etc. |

**REQUIRED SKILLS AND KNOWLEDGE**

This section describes skills and knowledge required for this unit of competency.

**Required Skills**

The individual needs to apply the following skills:

* Communication
* Prioritizing
* Problem-solving
* Organization
* Listening
* Interpersonal
* Shorthand
* Writing
* Telephone etiquette
* Multitasking

**Required knowledge**

The individual needs to apply knowledge of the following:

* Office rules, policies, procedures, and regulations
* Customer service
* Public relations
* Human relations
* Telephone handling

**EVIDENCE GUIDE**

This provides advice on assessment and must be read in conjunction with performance criteria, required skills, knowledge, and range.

|  |  |
| --- | --- |
| 1. Critical Aspects of Competency | Assessment requires evidence that the individual:   1. Answered incoming calls based on organization’s communication policy 2. Assessed incoming calls as per organization’s communication policy 3. Made outgoing calls based on organization’s communication policy 4. Recorded telephone messages based on organization’s communication policy 5. Acted upon call options as per organization’s communication policy 6. Recorded caller details based on organization’s records management policy 7. Recorded action on the caller’s subject as per organization’s records management policy 8. Reported communication equipment malfunction based on organization’s asset and maintenance procedure 9. Safely cleaned communication equipment as per organization’s cleaning and maintenance procedure 10. Safely stored communication equipment in line with organization’s asset and maintenance procedure |
| 1. Resource implications | The following resources should be provided:   1. Access to relevant workplace or appropriately simulated environment where assessment can take place 2. Materials relevant to the proposed activity or tasks |
| 1. Methods of assessment | Competency in this unit may be assessed through:   1. Practical 2. Projects 3. PoE evaluation 4. Third party reports 5. Written tests |
| 1. Context of assessment | The competency may be assessed in a workplace or a simulated workplace |
| 1. Guiding information for assessment | Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended. |