# Workplace Assessment Task 8 – Observation Form

*(This form is for the assessor’s use only)*

## **Purpose**

This *Observation Form* lists the practical skills that the candidate must demonstrate/perform while completing **Workplace Assessment Task 8.**

This form is to be completed by the candidate’s assessor to document their observations on the candidate’s performance in Workplace Assessment Task 8.

## **Task Overview**

For this task, the candidate is required to maintain and store documentation and reports in accordance with your organisation’s policies and procedures.

**For the purposes of this assessment, there must be evidence that they have maintained and stored:**

* **At least two types or pieces of documentation, e.g. updated individualised support plan, documentation of outcomes of risk management**
* **At least two reports, e.g. progress notes, hazard identification report, etc.**

The candidate must be observed by the assessor.

In this task, the candidate will be assessed on their:

* Practical knowledge of documentation and reports used in individualised support and relevant policies and procedures
* Practical skills relevant to maintaining and storing documentation and reports in the workplace

## **Instructions to the Assessor**

### Before the assessment

* Contextualise the performance benchmarks outlined in this *Observation Form* so that they align with:
  + The context of direct support work in which the candidate will provide support – aged care, home and community care, disability, or community service
  + Relevant legal and regulatory requirements and service standards, as well as those specific requirements from the relevant own state/territory
  + Relevant policies, processes, and procedures from your RTO or the candidate’s organisation/workplace
* Organise workplace resources required for this assessment.
* Discuss this assessment task with the candidate, including the practical skills they need to demonstrate during this task and the criteria for satisfactorily demonstrating each skill.
* Review this form with the candidate and address any queries or concerns they may have about it.

### During the assessment

* Observe the candidate as they complete the Workplace Assessment Task.
* For each practical skill listed in this observation form:
  + Tick YES if you confirm you have observed the candidate demonstrate/perform the practical skill.
  + Tick NO if you have not observed the candidate demonstrate/perform the practical skill.
* If you ticked YES, provide the date when you observed the candidate demonstrate the skill.
* Write specific comments on the candidate’s performance in each criterion. Your feedback/insights will help address any area/s for improvement.

### After the assessment

* Complete all parts of the *Observation Form*, including the *Assessor Declaration* on the last page of this form. Your signature must be handwritten.

## **Candidate Details**

|  |  |
| --- | --- |
| Candidate name |  |
| Title/designation |  |

## **Assessor Details**

|  |  |
| --- | --- |
| Candidate is observed and assessed by |  |
| Training Organisation |  |
| Relevant qualifications held |  |

## **Context of the Assessment**

|  |  |
| --- | --- |
| Workplace/organisation |  |
| Workplace supervisor |  |
| Direct support context | Aged care  Home and community  Disability  Community service  Others (please specify): |

|  |  |
| --- | --- |
| Resources required for the assessment | Direct support work environment in at least one aged care, home and community, disability, or community service organisation  Individual support documentation and reports  Facilities or equipment used to store and maintain documentation and reports, e.g. computer, filing cabinets, cloud storage, organisation intranet, etc.  Policies and procedures for maintaining and storing records and documentation. |
| Contextualisation | Assessor to specify below contextualisation they have done to this observation form.  State/territory legislation, regulations, and standards  Workplace systems, policies, and procedures  Equipment, tools, and facilities available in the candidate’s workplace/training organisation  Direct support context (indicated above)  Client’s individualised support plan, including their needs, preferences, and goals.  Others (please specify):  Summary:  Assessor to provide a summary of the contextualisation done here |

## **Candidate Assessment Briefing**

|  |  |
| --- | --- |
| Date of assessment briefing |  |

|  |  |
| --- | --- |
| **The assessor confirms:** | **YES/NO** |
| 1. They have discussed with the candidate the workplace task they are required to complete for this assessment. | YES  NO |
| 1. The candidate understands they will be assessed while completing this workplace task, as well as any document(s) they will complete as part of this task. | YES  NO |
| 1. They have discussed with the candidate instructions how they are to undertake the workplace task. | YES  NO |
| 1. They have provided the candidate guidance on how they can satisfactorily complete the task. | YES  NO |
| 1. They have discussed with the candidate the practical skills (listed below) they are required to demonstrate while completing this task. | YES  NO |
| 1. They have addressed the candidate’s questions or concerns about the workplace task and the assessment process. | YES  NO |

# Observation Form

**To the assessor:** The documentation and reports the candidate will store and maintain for this assessment will depend on the documents and reports they will handle in the workplace.

Before the assessment:

* Review the policies and procedures for storing and maintaining documentation and reports in the candidate’s workplace.
* Revise and update the criteria listed below to align with these policies and procedures.

## **Part I. Store and maintain documentation 1**

|  |  |
| --- | --- |
| Date of and time of assessment |  |
| Location of assessment |  |
| Documentation the candidate will store and maintain | e.g. Contact information of the client's family and carers to be updated |
| Policies and procedures to be followed |  |

| **During this workplace task:** | **YES/NO** | **Date observed** | **Assessor’s comments** |
| --- | --- | --- | --- |
| 1. The candidate accesses the documentation according to the organisation’s policies and procedures.   The assessor to specify how the candidate accesses the documentation (at least one must be ticked)  Securing permission to access documentation from the supervisor.  Logging in on the computer using assigned credentials.  Accessing documentation from the filing cabinet and returning it securely after use.  Others (please specify): | YES  NO |  |  |

| **During this workplace task:** | **YES/NO** | **Date observed** | **Assessor’s comments** |
| --- | --- | --- | --- |
| 1. The candidate updates the documentation to reflect: |  |  |  |
| * 1. Updated contact number of the client’s family/carers. | YES  NO |  |  |
| * 1. Updated address of the client’s family/carers. | YES  NO |  |  |
| * 1. Updated email address of the client’s family/carers. | YES  NO |  |  |
| 1. The candidate updates the version control and document history section, including: |  |  |  |
| 1. Updated version control (e.g. Version 1.0 to 1.1) | YES  NO |  |  |
| 1. Summary of updates made in the documentation | YES  NO |  |  |
| 1. Signing-off on the updated document. | YES  NO |  |  |
| 1. The candidate returns the updated documentation into its secure location.   The assessor to specify the secure location.  Locked filing cabinet.  If on the computer, closing the file and logging off from the computer.  Others (please specify): | YES  NO |  |  |

## **Part II. Store and maintain documentation 2**

|  |  |
| --- | --- |
| Date of and time of assessment |  |
| Location of assessment |  |
| Documentation the candidate will store and maintain | e.g. Contact information of the client's family and carers to be updated |
| Policies and procedures to be followed |  |

| **During this workplace task:** | **YES/NO** | **Date observed** | **Assessor’s comments** |
| --- | --- | --- | --- |
| 1. The candidate accesses the documentation according to the organisation’s policies and procedures.   The assessor to specify how the candidate accesses the documentation (at least one must be ticked)  Securing permission to access documentation from the supervisor.  Logging in on the computer using assigned credentials.  Accessing documentation from the filing cabinet and returning it securely after use.  Others (please specify): | YES  NO |  |  |
| 1. The candidate updates the documentation to reflect: |  |  |  |
| 1. Updated contact number of the client’s family/carers. | YES  NO |  |  |
| 1. Updated address of the client’s family/carers. | YES  NO |  |  |
| 1. Updated email address of the client’s family/carers. | YES  NO |  |  |

| **During this workplace task:** | **YES/NO** | **Date observed** | **Assessor’s comments** |
| --- | --- | --- | --- |
| 1. The candidate updates the version control and document history section, including: |  |  |  |
| 1. Updated version control (e.g. Version 1.0 to 1.1) | YES  NO |  |  |
| 1. Summary of updates made in the documentation | YES  NO |  |  |
| 1. Signing-off on the updated document. | YES  NO |  |  |
| 1. The candidate returns the updated documentation into its secure location.   The assessor to specify the secure location.  Locked filing cabinet.  If on the computer, closing the file and logging off from the computer.  Others (please specify): | YES  NO |  |  |

## **Part III. Store and maintain report 1**

|  |  |
| --- | --- |
| Date of and time of assessment |  |
| Location of assessment |  |
| Report the candidate will store and maintain | e.g. updated hazard identification report |
| Policies and procedures to be followed |  |

| **During this workplace task:** | **YES/NO** | **Date observed** | **Assessor’s comments** |
| --- | --- | --- | --- |
| 1. The candidate accesses the report according to the organisation’s policies and procedures.   The assessor to specify how the candidate accesses the documentation (at least one must be ticked)  Securing permission to access the report from the supervisor.  Logging in on the computer using assigned credentials.  Accessing the report from the filing cabinet and returning it securely after use.  Others (please specify): | YES  NO |  |  |

| **During this workplace task:** | **YES/NO** | **Date observed** | **Assessor’s comments** |
| --- | --- | --- | --- |
| 1. The candidate updates the report to reflect: |  |  |  |
| 1. Outcomes of investigations done on the hazard previously identified. | YES  NO |  |  |
| 1. Actions taken to minimise/eliminate the risks associated with the hazard. | YES  NO |  |  |
| 1. Recommendations and other comments. | YES  NO |  |  |
| 1. The candidate updates the version control and document history section, including: |  |  |  |
| 1. Updated version control (e.g. Version 1.0 to 1.1) | YES  NO |  |  |
| 1. Summary of updates made in the report | YES  NO |  |  |
| 1. Signing-off on the updated report. | YES  NO |  |  |
| 1. The candidate returns the updated report into its secure location.   The assessor to specify the secure location.  Locked filing cabinet.  If on the computer, closing the file and logging off from the computer.  Others (please specify): | YES  NO |  |  |

## **Part IV. Store and maintain report 2**

|  |  |
| --- | --- |
| Date of and time of assessment |  |
| Location of assessment |  |
| Report the candidate will store and maintain | e.g. updated hazard identification report |
| Policies and procedures to be followed |  |

| **During this workplace task:** | **YES/NO** | **Date observed** | **Assessor’s comments** |
| --- | --- | --- | --- |
| 1. The candidate accesses the report according to the organisation’s policies and procedures.   The assessor to specify how the candidate accesses the documentation (at least one must be ticked)  Securing permission to access the report from the supervisor.  Logging in on the computer using assigned credentials.  Accessing the report from the filing cabinet and returning it securely after use.  Others (please specify): | YES  NO |  |  |
| 1. The candidate updates the report to reflect: |  |  |  |
| 1. Outcomes of investigations done on the hazard previously identified. | YES  NO |  |  |
| 1. Actions taken to minimise/eliminate the risks associated with the hazard. | YES  NO |  |  |
| 1. Recommendations and other comments. | YES  NO |  |  |

| **During this workplace task:** | **YES/NO** | **Date observed** | **Assessor’s comments** |
| --- | --- | --- | --- |
| 1. The candidate updates the version control and document history section, including: |  |  |  |
| 1. Updated version control (e.g. Version 1.0 to 1.1) | YES  NO |  |  |
| 1. Summary of updates made in the report | YES  NO |  |  |
| 1. Signing-off on the updated report. | YES  NO |  |  |
| 1. The candidate returns the updated report into its secure location.   The assessor to specify the secure location.  Locked filing cabinet.  If on the computer, closing the file and logging off from the computer.  Others (please specify): | YES  NO |  |  |

|  |  |
| --- | --- |
| **Assessor Declaration**  By signing here, I confirm that I have observed the candidate, whose name appears above, store and maintain documentation and records in accordance with organisational policies and procedures.  I confirm that the information recorded on this *Observation Form* is true and accurately reflects the candidate’s performance during their completion of the workplace task. | |
| Assessor’s signature |  |
| Assessor’s name |  |
| Date signed |  |

End of Workplace Assessment – Observation Form