# Case Study Task 4.1 – Observation Form

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

This *Observation Form* lists the practical skills that the candidate must demonstrate/perform while completing **Case Study Task 4.1.**

This form is to be completed by the candidate’s assessor to document their observations on the candidate’s performance in Case Study Task 4.1.

## **Task Overview**

For this task, the candidate is required to meet with Trina while being observed by the assessor and ask her if she thinks that the financial issues the candidate identified are affecting her wellbeing.

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

* Practical knowledge relevant to discussing with a person the potential factors affecting their wellbeing.
* Practical skills relevant to discussing with a person the potential factors affecting their wellbeing.

## **Instructions to the Assessor**

### Before the assessment

* Organise workplace resources required for this assessment.
* Contextualise the criteria in this observation form so that they align with the case study scenario.
* Advise the candidate on the time and location of the 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.
* Brief the volunteers on their role in the assessment.

### During the assessment

* Observe the candidate as they complete the Case Study 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**

|  |  |  |
| --- | --- | --- |
| Assessment environment | Real workplace/organisation | Simulated environment |
| Mode of observation | Direct observation | Observation via video recording |
| Workplace/organisation |  | |
| Resources required for the assessment | A volunteer to act as Trina | |
| Contextualisation | Assessor to specify below contextualisation they have done to this observation form.  State/territory legislation, regulations, and standards  Workplace systems  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 case study task they are required to complete for this assessment. | YES  NO |
| 1. The candidate understands they will be assessed while completing this case study 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 on how they are to undertake the case study task. | YES  NO |
| 1. They have provided the candidate guidance on how to 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 case study task and the assessment process. | YES  NO |

# Observation Form

| **During this workplace task:** | **YES/NO** | **Date observed** | **Assessor’s comments** |
| --- | --- | --- | --- |
| 1. The candidate shares their findings with Trina. | YES  NO |  |  |
| 1. The candidate asks Trina if she agrees that these financial issues affected her wellbeing. | YES  NO |  |  |
| 1. The candidate uses questioning techniques to confirm understanding: |  |  |  |
| 1. The candidate uses open-ended questions.   E.g. What do you think? | YES  NO |  |  |
| 1. The candidate uses probing questions.   E.g. You mentioned this earlier, can you please elaborate on that? | YES  NO |  |  |

|  |  |
| --- | --- |
| **Assessor Declaration**  By signing here, I confirm that I have observed the candidate whose name appears above, meet with Trina and ask her if she thinks that the financial issues the candidate identified are affecting her wellbeing.  I confirm that the information recorded on this *Observation Form* is true and accurately reflects the candidate’s performance during their completion of the case study task. | |
| Assessor’s signature |  |
| Assessor’s name |  |
| Date signed |  |

End of Case Study – Observation Form