# Workplace Assessment Task 4 – Assessor’s Checklist

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

## **Purpose**

This *Assessor’s Checklist* lists the specific criteria that the candidate’s submission for **Workplace Assessment Task 4** must satisfactorily meet.

This form is to be completed by the candidate’s assessor to document their assessment of the candidate’s submission in Workplace Assessment Task 4.

## **Task Overview**

For this task, the candidate is required to complete one written and one electronic/digital workplace document.

*Workplace documents include emails, incident reports, student progress reports, meeting minutes, memos, and progress notes, e.g., for individual support clients, etc.*

*Written here means handwritten, e.g., a form is printed out and completed/accomplished by hand, while electronic/digital workplace documents refer to documents completed on an electronic/digital device, e.g., emails and encoded documents.*

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

* Practical knowledge of your organisation’s policies and procedures for written/electronic documents.
* Practical skills relevant to completing written or electronic documents.

## **Instructions to the Assessor**

### Before the assessment

* Organise workplace resources required for the candidate to complete this assessment.
* Discuss this assessment task with the candidate, including the criteria they need to meet to complete this task satisfactorily.
* Review this form with the candidate and address any queries or concerns they may have about it.

### During the assessment

* Review the candidate’s workplace document submissions.
* For each criterion listed in this checklist:
  + Tick YES if you confirm the candidate’s submission satisfactorily meets the criterion.
  + Tick NO if you confirm the candidate’s submission does not satisfactorily meet the criterion.
* Write specific comments on the candidate’s performance in each criterion. Your feedback/insights will be helpful in addressing any area/s for improvement.

### After the assessment

* Complete all parts of the *Assessor’s Checklist*, 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 assessed by |  |
| Training Organisation |  |
| Relevant qualifications held |  |

## **Context of the Assessment**

|  |  |
| --- | --- |
| Workplace/organisation |  |
| Resources required for the assessment | Workplace/organisation or a similar environment  Organisational forms and templates used for creating workplace documents, e.g., emails, incident reports, meeting minutes, etc.  Equipment to produce an electronic/digital document, e.g., computer, laptop, tablet, etc.  Apps produce an electronic/digital document, e.g., Microsoft Word  Legal requirements for completing documentation  Organisational policies, procedures, and standards for completing documentation  Organisational communication policies and procedures for using digital media |

## **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 on 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 criteria (listed below) they are required to meet to complete the task satisfactorily. | YES  NO |
| 1. They have addressed the candidate’s questions or concerns about the workplace task and the assessment process. | YES  NO |

# Assessor’s Checklist

## **Document 1: Written Document**

|  |  |
| --- | --- |
| Document |  |
| The assessor confirms the document is handwritten | YES  NO  For a satisfactory performance, this document/submission must be handwritten (a printed form accomplished/completed by hand is acceptable) |
| Legal requirements relevant to the completion of this document |  |
| Organisational policies and procedures to be followed when writing this document |  |

**IMPORTANT:**

The criteria below are currently contextualised to **progress notes.** Prior to the assessment, the assessor must contextualise the criteria below so that they reflect:

* the actual document completed by the candidate,
* relevant legal requirements for completing this document, and
* relevant policies, procedures, and standards the candidate’s organisation has in place for completing this document

|  |  |  |
| --- | --- | --- |
| **The candidate’s submission:** | **YES/NO** | **Assessor’s comments** |
| 1. Follows legal requirements that apply to this document.   **IMPORTANT: The assessor to contextualise the criteria below prior to the assessment.** |  |  |
| * 1. The client’s personal information and details are omitted. | YES  NO |  |
| * 1. Details the service/support/care provided | YES  NO |  |
| * 1. Details significant changes to the client’s health and wellbeing. | YES  NO |  |
| * 1. Details gaps in the service/support currently provided to the client. | YES  NO |  |
| 1. Follows relevant organisational policies and procedures and standards that apply to this document.   **IMPORTANT: The assessor to contextualise the criteria below prior to the assessment.** |  |  |
| 1. Written using the organisation’s template.   The assessor to specify the template:  e.g. Progress Notes template | YES  NO |  |
| 1. Date is indicated | YES  NO |  |
| 1. Uses black or blue ink | YES  NO |  |
| 1. A line is drawn on errors with a date and signature. | YES  NO |  |
| 1. Signed by the candidate | YES  NO |  |
| 1. Uses clear, accurate, and objective language to document events. |  |  |

|  |  |  |
| --- | --- | --- |
| **The candidate’s submission:** | **YES/NO** | **Assessor’s comments** |
| 1. Written clearly. | YES  NO |  |
| 1. Writing is neat and legible. | YES  NO |  |
| 1. Concise (sentences are kept short and direct to the point). | YES  NO |  |
| 1. Critical information is included: |  |  |
| * 1. What happened before | YES  NO |  |
| * 1. What happened during | YES  NO |  |
| * 1. What happened after | YES  NO |  |
| * 1. Other people present at that time | YES  NO |  |
| 1. Objective language is used throughout the document. |  |  |
| 1. The document does not include any personal assumptions from the candidate. | YES  NO |  |
| 1. The document only includes specific actions and events that were observed. | YES  NO |  |
| 1. The document does not include irrelevant details. | YES  NO |  |
| 1. Uses workplace/industry terminologies correctly.   The assessor to list below terminologies the candidate used correctly and accurately.  (For a satisfactory performance, there must be at least two terminologies listed here)  e.g. Activities for daily living | YES  NO |  |

## **Document 2: Electronic/Digital Document**

|  |  |
| --- | --- |
| Document |  |
| The assessor confirms the document is electronic | YES  NO  For a satisfactory performance, this document/submission must be electronic/digital or encoded using a digital device, e.g., computer, laptop, or tablet. |
| Legal requirements relevant to the completion of this document |  |
| Organisational policies and procedures to be followed when writing this document |  |

**IMPORTANT:**

The criteria below are currently contextualised to **email.** Prior to the assessment, the assessor must contextualise the criteria below so that they reflect:

* the actual document completed by the candidate,
* relevant legal requirements for completing this document, and
* relevant policies, procedures, and standards the candidate’s organisation has in place for completing this document and using digital media

|  |  |  |
| --- | --- | --- |
| **The candidate’s submission:** | **YES/NO** | **Assessor’s comments** |
| 1. Follows legal requirements that apply to this document.   **IMPORTANT: The assessor to contextualise the criteria below prior to the assessment.** |  |  |
| 1. The client’s personal information and details are omitted. | YES  NO |  |
| 1. Includes an email disclaimer, e.g. ‘If you are not the intended recipient of this email…’ or ‘if this email was sent to you by mistake….’ |  |  |

|  |  |  |
| --- | --- | --- |
| **The candidate’s submission:** | **YES/NO** | **Assessor’s comments** |
| 1. Follows relevant organisational policies and procedures, and standards that apply to this document.   **IMPORTANT: The assessor to contextualise the criteria below prior to the assessment.** |  |  |
| 1. Written using the organisation’s template.   The assessor to specify the template:  e.g. Appropriate email signature with the organisation's address/contact details | YES  NO |  |
| 1. Follows the organisation’s email etiquette policy and procedures: |  |  |
| 1. Uses a brief and concise subject line. | YES  NO |  |
| 1. Includes a professional greeting. | YES  NO |  |
| 1. Demonstrates polite and professional language throughout the email body. | YES  NO |  |
| 1. Avoids inappropriate use of exclamation points. | YES  NO |  |
| 1. Avoids inappropriate use of all caps. | YES  NO |  |
| 1. Uses clear, accurate, and objective language to document events. |  |  |
| 1. Written clearly. | YES  NO |  |

|  |  |  |
| --- | --- | --- |
| **The candidate’s submission:** | **YES/NO** | **Assessor’s comments** |
| 1. Email body is formatted neatly. |  |  |
| 1. Uses clear and legible font face (e.g., Calibri instead of Comic Sans) | YES  NO |  |
| 1. Proper spacing is used between lines. | YES  NO |  |
| 1. Font size and colour used make it easy to read. | YES  NO |  |
| 1. Concise (sentences are kept short and direct to the point). | YES  NO |  |
| 1. Objective language is used throughout the document. |  |  |
| 1. The document does not include any personal assumptions from the candidate. | YES  NO |  |
| 1. The document states facts with examples or instances. | YES  NO |  |
| 1. The document does not include irrelevant details. | YES  NO |  |
| 1. Uses workplace/industry terminologies correctly.   The assessor to list below terminologies the candidate used correctly and accurately.  (For a satisfactory performance, there must be at least two terminologies listed here)  e.g. Activities for daily living | YES  NO |  |

|  |  |
| --- | --- |
| **Assessor Declaration**  By signing here, I confirm that I have thoroughly reviewed the written and electronic workplace document submission for this workplace assessment task.  I confirm that the information recorded on this *Assessor’s Checklist* is true and accurately reflects the candidate’s submission for this workplace task. | |
| Assessor’s signature |  |
| Assessor’s name |  |
| Date signed |  |

End of Workplace Assessment - Assessor’s Checklist