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NATIONAL CERTIFICATES (VOCATIONAL)

ASSESSMENT GUIDELINES

OFFICE PRACTICE NQF LEVEL 2

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CONTENTS

SECTION A: PURPOSE OF THE SUBJECT ASSESSMENT GUIDELINES

SECTION B: ASSESSMENT IN THE NATIONAL CERTIFICATES (VOCATIONAL)

- 1 Assessment in the National Certificates (Vocational)**
- 2 Assessment framework for vocational qualifications**
 - 2.1 Internal continuous assessment (ICASS)
 - 2.2 External summative assessment (ESASS)
- 3 Moderation of assessment**
 - 3.1 Internal moderation
 - 3.2 External moderation
- 4 Period of validity of internal continuous assessment (ICASS)**
- 5 Assessor requirements**
- 6 Types of assessment**
 - 6.1 Baseline assessment
 - 6.2 Diagnostic assessment
 - 6.3 Formative assessment
 - 6.4 Summative assessment
- 7 Planning assessment**
 - 7.1 Collecting evidence
 - 7.2 Recording
 - 7.3 Reporting
- 8 Methods of assessment**
- 9 Instruments and tools for collecting evidence**
- 10 Tools for assessing student performance**
- 11 Selecting and/or designing recording and reporting systems**
- 12 Competence descriptions**
- 13 Strategies for collecting evidence**
 - 13.1 Record sheets
 - 13.2 Checklists

SECTION C: ASSESSMENT IN OFFICE PRACTICE

- 1 Schedule of assessment**
- 2 Recording and reporting**
- 3 Internal assessment of Subject Outcomes in Office Practice – Level 2**
- 4 Specifications for the external assessment in Office Practice – Level 2**
 - 4.1 Integrated summative assessment task (ISAT)
 - 4.2 National examination

SECTION A: PURPOSE OF THE SUBJECT ASSESSMENT GUIDELINES

This document provides the lecturer with guidelines to develop and implement a coherent, integrated assessment system for Office Practice in the National Certificates (Vocational). It must be read with the *National Policy Regarding Further Education and Training Programmes: Approval of the Documents, Policy for the National Certificates (Vocational) Qualifications at Levels 2 to 4 on the National Qualifications Framework (NQF)*. This assessment guideline will be used for National Qualifications Framework Levels 2-4.

This document explains the requirements for the internal and external subject assessment. The lecturer must use this document with the *Subject Guidelines: Office Practice* to prepare for and deliver Office Practice. Lecturers should use a variety of resources and apply a range of assessment skills in the setting, marking and recording of assessment tasks.

SECTION B: ASSESSMENT IN THE NATIONAL CERTIFICATES (VOCATIONAL)

1 ASSESSMENT IN THE NATIONAL CERTIFICATES (VOCATIONAL)

Assessment in the National Certificates (Vocational) is underpinned by the objectives of the National Qualifications Framework (NQF). These objectives are to:

- Create an integrated national framework for learning achievements.
- Facilitate access to and progression within education, training and career paths.
- Enhance the quality of education and training.
- Redress unfair discrimination and past imbalances and thereby accelerate employment opportunities.
- Contribute to the holistic development of the student by addressing:
 - social adjustment and responsibility;
 - moral accountability and ethical work orientation;
 - economic participation; and
 - nation-building.

The principles that drive these objectives are:

- **Integration**

To adopt a unified approach to education and training that will strengthen the human resources development capacity of the nation.

- **Relevance**

To be dynamic and responsive to national development needs.

- **Credibility**

To demonstrate national and international value and recognition of qualification and acquired competencies and skills.

- **Coherence**

To work within a consistent framework of principles and certification.

- **Flexibility**

To allow for creativity and resourcefulness when achieving Learning Outcomes, to cater for different learning styles and use a range of assessment methods, instruments and techniques.

- **Participation**

To enable stakeholders to participate in setting standards and co-ordinating the achievement of the qualification.

- **Access**

To address barriers to learning at each level to facilitate students' progress.

- **Progression**

To ensure that the qualification framework permits individuals to move through the levels of the national qualification via different, appropriate combinations of the components of the delivery system.

- **Portability**

To enable students to transfer credits of qualifications from one learning institution and/or employer to another institution or employer.

- **Articulation**

To allow for vertical and horizontal mobility in the education system when accredited pre-requisites have been successfully completed.

- **Recognition of Prior Learning**

To grant credits for a unit of learning following an assessment or if a student possesses the capabilities specified in the outcomes statement.

- **Validity of assessments**

To ensure assessment covers a broad range of knowledge, skills, values and attitudes (SKVAs) needed to demonstrate applied competency. This is achieved through:

- clearly stating the outcome to be assessed;
- selecting the appropriate or suitable evidence;
- matching the evidence with a compatible or appropriate method of assessment; and
- selecting and constructing an instrument(s) of assessment.

- **Reliability**

To assure assessment practices are consistent so that the same result or judgment is arrived at if the assessment is replicated in the same context. This demands consistency in the interpretation of evidence; therefore, careful monitoring of assessment is vital.

- **Fairness and transparency**

To verify that no assessment process or method(s) hinders or unfairly advantages any student. The following could constitute unfairness in assessment:

- Inequality of opportunities, resources or teaching and learning approaches
- Bias based on ethnicity, race, gender, age, disability or social class
- Lack of clarity regarding Learning Outcome being assessed
- Comparison of students' work with other students, based on learning styles and language

- **Practicability and cost-effectiveness**

To integrate assessment practices within an outcomes-based education and training system and strive for cost and time-effective assessment.

2 ASSESSMENT FRAMEWORK FOR VOCATIONAL QUALIFICATIONS

The assessment structure for the National Certificates (Vocational) qualification is as follows:

2.1 Internal continuous assessment (ICASS)

Knowledge, skills values, and attitudes (SKVAs) are assessed throughout the year using assessment instruments such as projects, tests, assignments, investigations, role-play and case studies. The internal continuous assessment (ICASS) practical component is undertaken in a real workplace, a workshop or a "Structured Environment". This component is moderated internally and externally quality assured by Umalusi. All internal continuous assessment (ICASS) evidence is kept in a Portfolio of Evidence (PoE) and must be readily available for monitoring, moderation and verification purposes.

2.2 External summative assessment (ESASS)

The external summative assessment is either a single or a set of written papers set to the requirements of the Subject Learning Outcomes. The Department of Education administers the theoretical component according to relevant assessment policies.

A compulsory component of external summative assessment (ESASS) is the **integrated summative assessment task (ISAT)**. This assessment task draws on the students' cumulative learning throughout the year. The task requires **integrated application of competence** and is executed under strict assessment conditions. The task should take place in a simulated or "Structured Environment". The integrated summative assessment task (ISAT) is the most significant test of students' ability to apply their acquired knowledge.

The integrated assessment approach allows students to be assessed in more than one subject with the same integrated summative assessment task (ISAT).

External summative assessments will be conducted annually between October and December, with provision made for supplementary sittings.

3 MODERATION OF ASSESSMENT

3.1 Internal moderation

Assessment must be moderated according to the internal moderation policy of the Further Education and Training (FET) college. Internal college moderation is a continuous process. The moderator's involvement starts with the planning of assessment methods and instruments and follows with continuous collaboration with and support to the assessors. Internal moderation creates common understanding of Assessment Standards and maintains these across vocational programmes.

3.2 External moderation

External moderation is conducted by the Department of Education, Umalusi and, where relevant, an Education and Training Quality Assurance (ETQA) body according to South African Qualifications Authority (SAQA) and Umalusi standards and requirements.

The external moderator:

- monitors and evaluates the standard of all summative assessments;
- maintains standards by exercising appropriate influence and control over assessors;
- ensures proper procedures are followed;
- ensures summative integrated assessments are correctly administered;
- observes a minimum sample of ten (10) to twenty-five (25) percent of summative assessments;
- gives written feedback to the relevant quality assessor; and
- moderates in case of a dispute between an assessor and a student.

Policy on inclusive education requires that assessment procedures for students who experience barriers to learning be customised and supported to enable these students to achieve their maximum potential.

4 PERIOD OF VALIDITY OF INTERNAL CONTINUOUS ASSESSMENT (ICASS)

The period of validity of the internal continuous assessment mark is determined by the *National Policy on the Conduct, Administration and Management of the Assessment of the National Certificates (Vocational)*.

The internal continuous assessment (ICASS) must be re-submitted with each examination enrolment for which it constitutes a component.

5 ASSESSOR REQUIREMENTS

Assessors must be subject specialists and should ideally be declared competent against the standards set by the ETDP SETA. If the lecturer conducting the assessments has not been declared a competent assessor, an assessor who has been declared competent may be appointed to oversee the assessment process to ensure the quality and integrity of assessments.

6 TYPES OF ASSESSMENT

Assessment benefits the student and the lecturer. It informs students about their progress and helps lecturers make informed decisions at different stages of the learning process. Depending on the intended purpose, different types of assessment can be used.

6.1 Baseline assessment

At the beginning of a level or learning experience, baseline assessment establishes the knowledge, skills, values and attitudes (SKVAs) that students bring to the classroom. This knowledge assists lecturers to plan learning programmes and learning activities.

6.2 Diagnostic assessment

This assessment diagnoses the nature and causes of learning barriers experienced by specific students. It is followed by guidance, appropriate support and intervention strategies. This type of assessment is useful to make referrals for students requiring specialist help.

6.3 Formative assessment

This assessment monitors and supports teaching and learning. It determines student strengths and weaknesses and provides feedback on progress. It determines if a student is ready for summative assessment.

6.4 Summative assessment

This type of assessment gives an overall picture of student progress at a given time. It determines whether the student is sufficiently competent to progress to the next level.

7 PLANNING ASSESSMENT

An assessment plan should cover three main processes:

7.1 Collecting evidence

The assessment plan indicates which Subject Outcomes and Assessment Standards will be assessed, what assessment method or activity will be used and when this assessment will be conducted.

7.2 Recording

Recording refers to the assessment instruments or tools with which the assessment will be captured or recorded. Therefore, appropriate assessment instruments must be developed or adapted.

7.3 Reporting

All the evidence is put together in a report to deliver a decision for the subject.

8 METHODS OF ASSESSMENT

Methods of assessment refer to who carries out the assessment and includes lecturer assessment, self-assessment, peer assessment and group assessment.

LECTURER ASSESSMENT	The lecturer assesses students' performance against given criteria in different contexts, such as individual work, group work, etc.
SELF-ASSESSMENT	Students assess their own performance against given criteria in different contexts, such as individual work, group work, etc.
PEER ASSESSMENT	Students assess another student or group of students' performance against given criteria in different contexts, such as individual work, group work, etc.
GROUP ASSESSMENT	Students assess the individual performance of other students within a group or the overall performance of a group of students against given criteria.

9 INSTRUMENTS AND TOOLS FOR COLLECTING EVIDENCE

All evidence collected for assessment purposes is kept or recorded in the student's Portfolio of Evidence (PoE).

The following table summarises a variety of methods and instruments for collecting evidence. A method and instrument is chosen to give students ample opportunity to demonstrate the Subject Outcome has been attained. This will only be possible if the chosen methods and instruments are appropriate for the target group and the Specific Outcome being assessed.

	METHODS FOR COLLECTING EVIDENCE		
	Observation-based (Less structured)	Task-based (Structured)	Test-based (More structured)
Assessment instruments	<ul style="list-style-type: none"> • Observation • Class questions • Lecturer, student, parent discussions 	<ul style="list-style-type: none"> • Assignments or tasks • Projects • Investigations or research • Case studies • Practical exercises • Demonstrations • Role-play • Interviews 	<ul style="list-style-type: none"> • Examinations • Class tests • Practical examinations • Oral tests • Open-book tests
Assessment tools	<ul style="list-style-type: none"> • Observation sheets • Lecturer's notes • Comments 	<ul style="list-style-type: none"> • Checklists • Rating scales • Rubrics 	<ul style="list-style-type: none"> • Marks (e.g. %) • Rating scales (1-7)
Evidence	<ul style="list-style-type: none"> • Focus on individual students • Subjective evidence based on lecturer observations and impressions 	<p>Open middle: Students produce the same evidence but in different ways.</p> <p>Open end: Students use same process to achieve different results.</p>	Students answer the same questions in the same way, within the same time.

10 TOOLS FOR ASSESSING STUDENT PERFORMANCE

Rating scales are marking systems where a symbol (such as 1 to 7) or a mark (such as 5/10 or 50%) is defined in detail. The detail is as important as the coded score. Traditional marking, assessment and evaluation mostly used rating scales without details such as what was right or wrong, weak or strong, etc.

Task lists and **checklists** show the student what needs to be done. They consist of short statements describing the expected performance in a particular task. The statements on the checklist can be ticked off when the student has adequately achieved the criterion. Checklists and task lists are useful in peer or group assessment activities.

Rubrics are a hierarchy (graded levels) of criteria with benchmarks that describe the minimum level of acceptable performance or achievement for each criterion. It is a different way of assessment and cannot be compared to tests. Each criterion described in the rubric must be assessed separately. Mainly, two types of rubrics, namely holistic and analytical, are used.

11 SELECTING AND/OR DESIGNING RECORDING AND REPORTING SYSTEMS

The selection or design of recording and reporting systems depends on the purpose of recording and reporting student achievement. **Why** particular information is recorded and **how** it is recorded determine which instrument will be used.

Computer-based systems, for example spreadsheets, are cost and time effective. The recording system should be user-friendly and information should be easily accessed and retrieved.

12 COMPETENCE DESCRIPTIONS

All assessment should award marks to evaluate specific assessment tasks. However, marks should be awarded against rubrics and not simply be a total of ticks for right answers. Rubrics should explain the competence level descriptors for the skills, knowledge, values and attitudes (SKVAs) a student must demonstrate to achieve each level of the rating scale.

When lecturers or assessors prepare an assessment task or question, they must ensure that the task or question addresses an aspect of a Subject Outcome. The relevant Assessment Standard must be used to create the rubric to assess the task or question. The descriptions must clearly indicate the minimum level of attainment for each category on the rating scale.

13 STRATEGIES FOR COLLECTING EVIDENCE

A number of different assessment instruments may be used to collect and record evidence. Examples of instruments that can be (adapted and) used in the classroom include:

13.1 Record sheets

The lecturer observes students working in a group. These observations are recorded in a summary table at the end of each project. The lecturer can design a record sheet to observe students' interactive and problem-solving skills, attitudes towards group work and involvement in a group activity.

13.2 Checklists

Checklists should have clear categories to ensure that the objectives are effectively met. The categories should describe how the activities are evaluated and against what criteria they are evaluated. Space for comments is essential.

SECTION C: ASSESSMENT IN OFFICE PRACTICE

1 SCHEDULE OF ASSESSMENT

At NQF levels 2, 3 and 4, lecturers will conduct assessments as well as develop a schedule of formal assessments that will be undertaken in the year. All three levels also have an external examination that accounts for 50 percent of the total mark. The marks allocated to assessment tasks completed during the year, kept or recorded in a Portfolio of Evidence (PoE) account for the other 50 percent.

The Portfolio of Evidence (PoE) and the external assessment include practical and written components. The practical assessment in Office Practice must, where necessary, be subjected to external moderation by Umalusi or an appropriate Education and Training Quality Assurance (ETQA) body, appointed by the Umalusi Council in terms of Section 28(2) of the *General and Further Education and Training Quality Assurance Act, 2001 (Act No. 58 of 2001)*.

2 RECORDING AND REPORTING

Office Practice, as is the case for all the other Vocational subjects, is assessed according to five levels of competence. The level descriptions are explained in the following table.

Scale of Achievement for the Vocational component

RATING CODE	RATING	MARKS %
5	Outstanding	80-100
4	Highly competent	70-79
3	Competent	50-69
2	Not yet competent	40-49
1	Not achieved	0-39

The programme of assessment should be recorded in the Lecturer's Portfolio of Assessment for each subject. The following should at least be included in the Lecturer's Assessment Portfolio:

- A contents page
- The formal schedule of assessment
- The requirements for each assessment task
- The tools used for each assessment task
- Recording instrument(s) for each assessment task
- A mark sheet and report for each assessment task

The college must standardise these documents.

The student's Portfolio of Evidence (PoE) must at least include:

- A contents page
- The assessment tasks according to the assessment schedule
- The assessment tools or instruments for the task
- A record of the marks (and comments) achieved for each task

Where tasks cannot be contained as evidence in the Portfolio of Evidence (PoE), its exact location must be recorded and it must be readily available for moderation purposes.

ASSESSMENT OF OFFICE PRACTICE

LEVEL 2

3 INTERNAL ASSESSMENT OF SUBJECT OUTCOMES IN OFFICE PRACTICE – LEVEL 2

Topic 1: Maintain the Reception Area

SUBJECT OUTCOME	
Describe and apply security procedures according to organisational requirements.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> The signing in and out of visitors is implemented. Visitor's cards and permits are issued and the displaying thereof is explained. Firearms are handed in by visitors where required. Visitors roaming the premises are validated when required. 	<ul style="list-style-type: none"> Explain how visitor cards and permits are issued and displayed. Describe the procedure for handing in visitors' firearms. Describe and apply procedures for validating unidentified visitors roaming on the premises.

SUBJECT OUTCOME	
Maintain a clean and safe reception area according to organisational standards.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> Housekeeping standards are listed and explained according to organisational requirements. Housekeeping standards are implemented within agreed timeframes. It is demonstrated that reception services are not disrupted while housekeeping activities take place. 	<ul style="list-style-type: none"> List and explain housekeeping standards according to organisational requirements. Implement housekeeping standards within agreed timeframes. Demonstrate that reception services are not disrupted while housekeeping activities are performed.

SUBJECT OUTCOME	
Create a presentable reception area.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> Corporate image displays are co-ordinated to create presentable reception area. The display area is kept neat, tidy and clean at all times. A constant stock of company brochures for distribution is maintained (where applicable). 	<ul style="list-style-type: none"> Relate and co-ordinate corporate image displays to create a presentable reception area. Keep the display area neat, tidy and clean at all times. Constantly maintain and stock brochures of companies for distribution.

ASSESSMENT TASKS OR ACTIVITIES FOR TOPIC 1	
<ul style="list-style-type: none"> Practical exercises Simulated Enterprise 	<ul style="list-style-type: none"> E-learning

Topic 2: Answer Customer Enquiries in an Office Setting

SUBJECT OUTCOME	
Greet a customer and identify his or her need or problem.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> The customer is greeted promptly and courteously according to established procedures. Additional information to clarify the need or problem is requested or obtained from the customer. The customer's need is identified and, if necessary, further clarification is obtained from the customer. Enquiries of a semi-routine and predictable nature are resolved by applying known procedures. 	<ul style="list-style-type: none"> Greet the customer courteously according to established procedures. Request or obtain additional information to clarify the customer's need. Identify the customer's need and, if necessary, reflect back to the customer to obtain clarity. Describe and apply known procedures to resolve enquiries of semi-routine and predictable nature.

SUBJECT OUTCOME	
Attend to a customer's telephone, facsimile and electronic request.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • In a limited range of established contexts, the query is answered clearly, accurately, confidently and objectively. • The requested information is supplied or the request is refused politely, with reasons for the declination. • Details of customer's requests are recorded following established and familiar procedures that include but are not limited to computerised spreadsheets and/or logbooks. • The details of the enquiry are noted and the entry is checked for accuracy with the caller. • The call is concluded according to established and familiar procedures. 	<ul style="list-style-type: none"> • Answer queries in a limited range of established contexts clearly, accurately, objectively and confidently. • Supply requested information or refuse requests politely and provide reasons for declining requests. • Request and record details of customers by following established and familiar procedures (limited to computerised spreadsheets and/or logbooks). • Note the details of the enquiry and reflect back to the caller to check for accuracy. • Conclude the call according to established and familiar procedures.

SUBJECT OUTCOME	
Refer a customer's request.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • Reasons for the delay or non-availability of assistance are explained following established procedures. • Enquiries of an unpredictable nature that should be referred to experienced staff are identified and are acted on according to established procedures. • The policy for dealing with unusual problems or queries is known and applied in cases where the problem falls outside familiar contexts. • An agreement is reached with the customer on follow-up action. 	<ul style="list-style-type: none"> • Follow established procedures to explain delays or non-availability of assistance. • Identify and describe enquiries of unpredictable nature that should be referred to experienced staff. • Describe and apply procedures for dealing with unusual or unfamiliar problems and queries. • Explain how to reach agreement with the customer on follow-up actions.

SUBJECT OUTCOME	
Respond to customers in a face-to-face situation and on the telephone.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • The customer complaint or query is acknowledged according to established procedures. • Accurate and relevant information needed to deal with the query is obtained following familiar procedures. • Complaints and promises made to the customer are communicated promptly to senior staff for information and verification. • Feedback regarding the progress of the complaint is given to the customer, following consultation with a more senior staff member. • The client interaction is recorded as required by company policy. 	<ul style="list-style-type: none"> • Identify and acknowledge customer complaints according to established procedures. • Describe and apply procedures to obtain accurate and relevant information needed to deal with queries. • Communicate complaints and promises made to customers promptly to senior staff for information and verification. • After consultation with senior staff members, give feedback to customers regarding the progress of complaints. • Describe and apply procedures to classify calls. • Record the client interaction as required by company policy.

ASSESSMENT TASKS OR ACTIVITIES FOR TOPIC 2	
<ul style="list-style-type: none"> • Practical exercises 	<ul style="list-style-type: none"> • Simulated Enterprise

Topic 3: Receive, Consult and Direct Visitors in a Reception Area

SUBJECT OUTCOME
Receive visitors in accordance with organisational requirements.

ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • Visitors are acknowledged and greeted according to organisational requirements. • A rapport with visitors is established. • A professional appearance is projected at all times. • Visitors' requirements are verified as per organisational requirements. 	<ul style="list-style-type: none"> • Acknowledge and greet visitors according to organisational requirements. • Establish a rapport with visitors. • Maintain professional appearance and behaviour at all times. • Verify visitors' requirements according to organisational requirements.

SUBJECT OUTCOME	
Process visitors' requirements according to organisational procedures.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • Visitor is consulted in a professional manner and the person's reason for visiting is established. • If information is sought, the visitor's enquiry is attended to promptly. • Estimated time or waiting period is conveyed to the client. • Documents or deliveries are documented and dispatched as per organisational requirements. 	<ul style="list-style-type: none"> • Consult visitors in a professional manner and establish the reason for their visit. • Attend promptly to a request for information. • Estimate the time or waiting period and convey it to the client. • Document and dispatch documents or deliveries as per organisational requirements.

SUBJECT OUTCOME	
Direct visitors according to organisational requirements.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • The relevant party is notified of visitors' arrival. • Visitors are given clear directions to the relevant area within the workplace. • Department and security procedures for visitors are explained and applied. 	<ul style="list-style-type: none"> • Notify relevant parties of visitors' arrival. • Give clear directions to visitors to relevant areas in the workplace. • Explain and apply security procedures for visitors.

ASSESSMENT TASKS OR ACTIVITIES FOR TOPIC 3	
<ul style="list-style-type: none"> • Practical exercises • Simulated Enterprise 	<ul style="list-style-type: none"> • E-learning

Topic 4: Employ Effective Telephone Etiquette

SUBJECT OUTCOME	
Employ effective telephone etiquette.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • Telephone etiquette and answering procedures are explained. • The factors that hinder communication are identified and explained. • Calls are handled with discretion and confidentiality. • A caller is put on hold when not conversing directly with the caller. • A caller on hold is frequently consulted to establish whether he or she wishes to remain on hold. 	<ul style="list-style-type: none"> • Explain and apply telephone etiquette and answering procedures. • Identify and explain factors that hinder communication. • Handle calls with discretion and confidentiality. • Put the caller on hold when not conversing directly with the caller. • Frequently consult with a caller on hold and establish whether he or she wishes to remain on hold.

SUBJECT OUTCOME	
Answer telephone according to organisational standards.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • Telephone is answered promptly and according to standard operating procedures. 	<ul style="list-style-type: none"> • Answer telephones promptly and according to standard operating procedures.

<ul style="list-style-type: none"> • Caller is greeted according to organisational requirements. • Relevant caller information is acquired during initial interaction. 	<ul style="list-style-type: none"> • Greet caller according to organisational requirements. • Acquire relevant caller information during initial interaction.
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SUBJECT OUTCOME	
Process incoming calls according to organisational standards.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • A call is appropriately redirected. • Multiple lines and holding techniques are handled using the correct technique. • Calls are screened as per standard operating procedures. • A message is taken and transmitted if required or requested according to organisational requirements. • Further assistance is obtained from an appropriate source, if required. 	<ul style="list-style-type: none"> • Redirect calls appropriately. • Explain and apply the correct techniques to handle and hold multiple lines. • Screen calls as per standard operating procedures. • Take and transmit messages if required or requested according to organisational requirements. • If required, obtain further assistance from appropriate sources.

SUBJECT OUTCOME	
Process outgoing calls in accordance with organisational requirements.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • Information and documentation required for the call are obtained and prepared. • The correct number is dialled when making an outgoing call. • The purpose of the call is stated clearly and according to organisational procedures. • Resulting actions from calls are recorded. • Messages are left, if required or requested according to organisational requirements. 	<ul style="list-style-type: none"> • Obtain and prepare information and documentation required for the call. • Dial the correct number when making outgoing calls. • Clearly state the purpose of calls according to organisational procedures. • Record resulting actions from calls. • If required or requested, leave messages according to organisational requirements.

ASSESSMENT TASKS OR ACTIVITIES FOR TOPIC 4	
<ul style="list-style-type: none"> • Practical exercises 	<ul style="list-style-type: none"> • Simulated Enterprise

Topic 5: Operate and Take Care of Equipment

SUBJECT OUTCOME	
Operate four different items of office equipment according to manufacturer operating instructions.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • Instructions for operating equipment are understood and followed responsibly with due regard for safety. • Predictable problems or faults that occur routinely are identified and solved using known solutions. • Persistent and non-routine problems or faults that require technical skills are recognised and reported to the relevant authority. 	<ul style="list-style-type: none"> • Explain and apply instructions for operating equipment responsibly and with due regard for safety. • Apply known solutions to identify and solve predictable problems or faults that occur routinely. • Identify and report persistent and non-routine problems or faults that require technical skills to the relevant authority.

SUBJECT OUTCOME	
Maintain equipment in a clean and working condition.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • Equipment is cleaned and kept in good repair and consumable items are replaced according to the manufacturer's instructions. • The dangers of working with electricity are known and 	<ul style="list-style-type: none"> • Clean and maintain equipment and replace consumable items according to the manufacturer's instructions. • Explain the dangers of working with electricity and

<p>understood and safety precautions are applied when cleaning equipment.</p> <ul style="list-style-type: none"> Discarded items are disposed of safely and appropriately. The equipment and immediate work area are left in a clean and tidy condition. Recyclable components are stored safely and dispatched according to company policy. 	<p>apply the prescribed safety precautions when cleaning equipment.</p> <ul style="list-style-type: none"> Dispose of discarded items safely and appropriately. Leave equipment and immediate work areas in a clean and tidy condition. Store and dispatch recyclable components safely and according to company policy.
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SUBJECT OUTCOME	
Monitor and request equipment consumables.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> The quantity of consumables needed per item of equipment on an average day is calculated. Equipment consumables are monitored and low levels reported using familiar procedures. Equipment consumables are requested according to established procedures. Equipment consumables are handled correctly and stored securely according to established and familiar procedures. Equipment consumables are used in expiry date sequence, the oldest ones first. Legible and accurate equipment consumable records are kept up-to-date. 	<ul style="list-style-type: none"> Calculate the average daily quantity of consumables needed per item of equipment. Describe and apply procedures to monitor equipment consumable levels and report low levels. Request equipment consumables according to established procedures. Describe and apply procedures for secure handling and storage of equipment consumables. Use equipment consumables in expiry date sequence, the oldest products first. Keep up-to-date, legible and accurate equipment consumable records.

SUBJECT OUTCOME	
Identify and minimise safety risks when operating equipment in an office environment.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> Existing or potential safety risks involving equipment are corrected in own area of responsibility. Safety risks involving equipment outside own authority are identified and reported promptly and accurately to the appropriate authority. Actions taken to deal with emergencies involving equipment are identified and are reported promptly and accurately to the appropriate authority. Emergencies involving equipment are reported and recorded accurately in an agreed format. The area around the equipment is organised to minimise risk to self and others. 	<ul style="list-style-type: none"> Correct existing or potential safety risks involving equipment in own area of responsibility. Identify and describe safety risks involving equipment outside own responsibility and report risks promptly and accurately to the appropriate authority. Identify and describe actions to deal with emergencies involving equipment. Report and record emergencies involving equipment accurately in an agreed format. Organise the area around equipment to minimise risk to self and others. Identify and apply procedures to minimise safety risks when operating equipment in an office environment.

ASSESSMENT TASKS OR ACTIVITIES FOR TOPIC 5	
<ul style="list-style-type: none"> Projects Demonstrations 	<ul style="list-style-type: none"> E-learning Simulated Enterprise

Topic 6: Receive, Distribute and Dispatch Mail

SUBJECT OUTCOME	
Receive and sort mail.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> Mail is received according to established procedures. Mail is sorted according to established procedures within an appropriate time. The importance of maintaining confidentiality and security of documentation in terms of receiving and 	<ul style="list-style-type: none"> Receive mail according to established procedures. Sort mail according to established procedures within an appropriate time. Describe the importance of maintaining confidentiality and security of documentation in terms of receiving

<p>sorting mail is known and understood and confidentiality is strictly observed in terms of a mailroom code of conduct.</p>	<p>and sorting mail.</p> <ul style="list-style-type: none"> Strictly observe confidentiality in terms of a mailroom code of conduct.
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SUBJECT OUTCOME	
Distribute and dispatch mail.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> Mail is distributed internally to relevant persons within an agreed time. Possible reasons for necessary delays in distribution are explained with examples of the consequences when there are unavoidable disruptions. Procedures for dispatching mail externally are known and understood in accordance with established procedures and Post Office requirements. Enclosures are securely attached and any missing items are reported using a familiar procedure. Mail is legibly and correctly addressed for internal and external distribution. Mail is dispatched externally by Post Office or courier service within agreed deadlines. 	<ul style="list-style-type: none"> Distribute mail internally to relevant persons within an agreed time. Explain possible reasons for unavoidable or necessary delays in distribution and describe the possible consequences of delays. Describe and apply procedures for dispatching mail externally in accordance with established procedures and Post Office requirements. Attach enclosures securely and report missing items according to organisational procedures. Address mail legibly and correctly for internal and external distribution. Dispatch mail externally by Post Office or courier service within agreed deadlines.

SUBJECT OUTCOME	
Describe the importance of mailroom processes and why it is necessary to create evidence.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> The reasons for stamping incoming mail are known and understood and mail is stamped correctly according to established requirements. Different ways of recording different tasks and the reason for creating the record are understood in terms of different departmental requirements. The legal implications of neglecting to comply with mailroom procedures are understood in terms of own work performance and possible cost to company. The concept that errors and mistakes cost money is understood; ways of avoiding unnecessary errors are described and own performance is considered with a view to improvement. 	<ul style="list-style-type: none"> Explain the reasons for stamping incoming mail. Stamp mail correctly according to established requirements. Record procedures for executing different tasks and explain the reason for creating the record in terms of departmental requirements. Explain the legal implications of neglecting to comply with mailroom procedures in terms of own work performance and possible cost to the company. Explain why it is important to avoid unnecessary errors in terms of cost and own performance.

ASSESSMENT TASKS OR ACTIVITIES FOR TOPIC 6	
<ul style="list-style-type: none"> Demonstrations 	<ul style="list-style-type: none"> Simulated Enterprise

Topic 7: Create Evidence and Maintain Confidentiality

SUBJECT OUTCOME	
Identify and maintain the types of record required in own industry and understand why it is necessary to create evidence and maintain confidentiality.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> The reason for recording information is explained with reference to an actual document used in a selected business sector. Five examples are listed of the types of information contained in records in one's own business sector. Three methods of creating records that use different types of technology are named. The purpose for which a record is used is described for three different roles in one's own organisation. 	<ul style="list-style-type: none"> Explain the reason for recording information with reference to an actual document used in a selected business sector. List five examples of the types of information contained in records in one's own business sector. Name three methods of creating records that use different types of technology. Describe three different roles in an organisation and explain the purposes for which records are kept.

SUBJECT OUTCOME	
Name and describe the types of record that are specific to a contract in a selected business sector.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • The type of information contained in a contract, agreement or quotation is explained with reference to an actual document. • The purpose of maintaining a record of contracts, agreements and quotations is described with reference to specific case studies. • The importance of recording specific client details is known and explained with examples from a selected business sector. • The purpose of recording changes to contracts, agreements and quotations is explained with reference to three different circumstances. 	<ul style="list-style-type: none"> • Explain the type of information contained in a contract, agreement or quotation with reference to an actual document. • Describe the purpose of maintaining a record of contracts, agreements and quotations with reference to specific case studies. • Explain the importance of recording specific client details with examples from a selected business sector. • Explain the purpose of recording changes to contracts, agreements and quotations with reference to three different circumstances.

SUBJECT OUTCOME	
Locate and provide records to users on request.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • Suitable paper or electronic filing systems are used to locate the required record. • Requested data is located, accessed and retrieved within agreed organisational service levels. • The reasons why confidential records are given only to authorised people are known and explained and the implications of releasing information to unauthorised persons are understood in terms of risk to company. • A copy of a record is made and provided as requested, the request and compliance are noted and the original documents are returned to their correct location. • The confidentiality of records is maintained at all times and security procedures are explained in simple terms. 	<ul style="list-style-type: none"> • Use suitable paper or electronic filing systems to locate the required record. • Locate, access and retrieve requested data within agreed organisational service levels. • Explain reasons why confidential records are given only to authorised people and the implications of releasing information to unauthorised persons in terms of risk to the organisation. • Make and provide a copy of a record, note compliance to original documents and return original documents to their correct location. • Explain and apply security and confidentiality procedures for records.

SUBJECT OUTCOME	
Maintain confidentiality of customer and company information.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • Violations of company procedures relating to the confidentiality of information are recognised and reported following established procedures. • Information classified as confidential is recognised as such and is disclosed only to approved personnel. • Company and legal requirements are known and understood and all outputs or inputs to the storage system are recorded according to established procedures. • Situations where colleagues do not comply with security and confidentiality procedures are identified and immediately reported to the appropriate authority. • All work activities are carried out according to the code of conduct and within the security requirements of the organisation. 	<ul style="list-style-type: none"> • Use established procedures to identify and report violations of company procedures relating to confidentiality of information. • Identify and disclose classified information to approved personnel. • Explain organisational and legal requirements for storage systems and procedures. • Identify situations where colleagues do not comply with security and confidentiality procedures and report immediately to the appropriate authority. • Carry out all work activities according to the code of conduct and within the security requirements of the organisation.

ASSESSMENT TASKS OR ACTIVITIES FOR TOPIC 7	
<ul style="list-style-type: none"> • Projects • Tasks 	<ul style="list-style-type: none"> • Case studies

Topic 8: File a Variety of Documents in Existing Systems

SUBJECT OUTCOME	
File a variety of documents in existing systems.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • Paper-based documentation is classified, sorted and recorded according to established requirements. • Information is stored in the correct location and sequence and the effect that misfiled documentation has on an organisation is understood. • Documents are stored in a manner that ensures that they are undamaged, safe and accessible when required. • Information is classified and cross-referenced accurately and classification uncertainties are referred to an appropriate authority. • The method of classification and cross-referencing is understood and the problems that result from unconventional classification or cross-referencing are explained in a familiar context. • The process for locating information is current, accurate and in a prescribed format according to the organisation's procedures for archiving. The implications for productivity of an item not being located are understood. • Documentation is sourced and filing is gathered. • An electronic file is created and labelled according to requirements. • Electronic documentation is filed according to organisational requirements. • Filing is completed within organisational timeframes and standards. • Classification uncertainties are referred to an appropriate authority. • All materials are classified, sorted and stored without damage in a safe and secure manner. 	<ul style="list-style-type: none"> • Oversee that paper-based documentation is classified, sorted and recorded according to established procedures. • Store information in the correct location and sequence and explain the effect of misfiled documentation on an organisation. • Store documents in a manner that ensures safety, security and accessibility. • Classify information and cross-reference accurately. • Refer classification uncertainties to an appropriate authority. • Explain methods of classification and cross-referencing and problems resulting from unconventional classification and cross-referencing. • Archive and locate documents according to organisational procedures. • Explain the implications for productivity when an item cannot be located. • Source and gather filing documentation. • Electronically create and label documents according to organisational requirements. • File electronic documentation according to organisational requirements. • Complete filing within organisational timeframes and standards. • Sort, classify and store all materials in a safe and secure manner.

SUBJECT OUTCOME	
Retrieve information from an existing storage system.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • Required information is promptly located, obtained, copied and dispatched to the correct person or location. • Delays in the supply of information are communicated and the reason for delay is explained politely. • Information retrieved is correctly recorded to track all files. • Missing or overdue items are identified and correct procedures followed to locate them. 	<ul style="list-style-type: none"> • Obtain, copy and dispatch information promptly to the correct person or location. • Communicate supply delays and politely explain reasons for delay. • Record information retrieved correctly to track all files. • Identify missing or overdue items and follow correct procedures to locate them.

SUBJECT OUTCOME	
Store valuable documentation and reference materials securely.	
ASSESSMENT STANDARDS	LEARNING OUTCOMES
<ul style="list-style-type: none"> • The process for securing valuable items and for 	<ul style="list-style-type: none"> • Explain and maintain the process for securing

<ul style="list-style-type: none"> maintaining that security is known and followed. Reasons for security procedures are explained with examples of the effects on an organisation when there is a breach of security. Security risks are identified and corrected in own area of authority. Violations of security are recognised and reported following familiar and established procedures. 	<ul style="list-style-type: none"> valuable items. Explain the reasons for security procedures and describe the effects of a breach of security on an organisation. Identify and correct security risks in own area of responsibility. Identify and report security violations according to organisational procedures.
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ASSESSMENT TASKS OR ACTIVITIES FOR TOPIC 8	
<ul style="list-style-type: none"> Demonstrations Practical exercises 	<ul style="list-style-type: none"> Simulated Enterprise E-learning

4 SPECIFICATIONS FOR EXTERNAL ASSESSMENT IN OFFICE PRACTICE – LEVEL 2

4.1 Integrated summative assessment task (ISAT)

A compulsory component of the external assessment (ESASS) is the **integrated summative assessment task (ISAT)**. The integrated summative assessment task (ISAT) draws on the students' cumulative learning achieved throughout the year. The task requires **integrated application of competence** and is executed and recorded in compliance with assessment conditions.

Two approaches to the integrated summative assessment task (ISAT) may be as follows:

The students are assigned a task at the beginning of the year which they will have to complete in phases throughout the year to obtain an assessment mark. A final assessment is made at the end of the year when the task is completed.

OR

Students achieve the competencies throughout the year but the competencies are assessed cumulatively in a single assessment or examination session at the end of the year.

The integrated summative assessment task (ISAT) is set by an externally appointed examiner and is conveyed to colleges in the first quarter of the year.

The integrated assessment approach enables students to be assessed in more than one subject with the same integrated summative assessment task (ISAT).

4.2 National Examination

A National Examination is conducted annually in October or November by means of a paper(s) set and moderated externally. The following distribution of cognitive application should be followed:

LEVEL 2	KNOWLEDGE AND COMPREHENSION	APPLICATION	ANALYSIS, SYNTHESIS AND EVALUATION
	40%	40%	20%

MARK ALLOCATION PER QUESTION		
Section 1: Compulsory (must cover all topics)		
Two questions of 25 marks each, covering short questions, e.g. true or false, leave out words and monkey puzzles.		50 marks
Section 2: Compulsory		
Question 1:	Operate and Take Care of Equipment	30 marks
Question 2:	Receive, Distribute and Dispatch Mail	30 marks
Question 3:	Create Evidence and Maintain Confidentiality	20 marks
Question 4:	Maintain the Reception Area	20 marks
		100 marks
GRAND TOTAL		150 marks