



education

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SUBJECT GUIDELINES

OFFICE PRACTICE

NQF Level 3

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OFFICE PRACTICE – LEVEL 3

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INTRODUCTION

A. What is Office Practice?

Office Practice equips students with the skills, knowledge, values and attitudes required to be successful as an administrative, secretarial or personal assistant. The subject lays the foundation for lifelong learning and creates the opportunity for further and higher education.

Office Practice is designed to give students relevant and marketable skills and applied competencies for employment and self-employment in the office administration sector. Administration competencies apply to all industries, both in the formal and informal commercial sectors and the non-commercial sector. Office Practice simultaneously builds the cognitive ability and provides the required fundamental learning necessary to access employment in the business and administration sector and related studies at further and higher education level with enhanced employment opportunities.

B. Why is Office Practice important in the Office Administration programme?

A sound knowledge of business practice will serve students as a usable foundation in an office environment. The subject prepares students for the world of work in general and for performing office functions in particular. The practical components of business practice will increase students' competence levels in such a way that they will be productive in positions for which office skills are required.

Students will acquire the skills to work in an administrative environment, including small, medium and micro enterprises, where the acquisition of competence will add value to the student's job performance or increase the student's chances of finding employment.

C. The link between the Office Practice Learning Outcomes and the Critical and Developmental Outcomes

In Office Practice, students develop the skill to plan before commencing any work. Students learn to understand and adapt to the social environment by meaningfully interpreting office practices which they will come across in their future lives. They develop the logical thought processes so that instead of relying on set rules, they are able to apply basic office principles to new and unfamiliar situations. Students also develop a systematic approach to problem solving.

D. Factors that contribute to achieving the Office Practice Learning Outcomes

Students interested in commerce or the business world will benefit by doing Office Practice. This subject is focused on the skills necessary for the office or personal assistant function of any business and is essential for any student exploring management as a future career opportunity. Students will acquire the core skills of handling information, technology and communication and secretarial skills, practices and procedures in a business environment. Students will also develop the ability to communicate effectively in an office environment and the ability to be creative and people-centred in an office environment.

Students who have specific characteristics such as thoroughness, accuracy and orderliness will enjoy Office Practice.

1 DURATION AND TUITION TIME

This is a one year instructional programme comprising 200 teaching and learning hours. The subject may be offered on a part-time basis provided all of the assessment requirements.

Course preparation should consider students with special education needs.

2 SUBJECT LEVEL FOCUS

The general/overall aim of the subject at this level is to equip students with the necessary skills to function effectively in the business environment.

3 ASSESSMENT REQUIREMENTS

3.1 Internal assessment (50 percent)

3.1.1 Theoretical Component

The theoretical component of Office Practice will form 40 percent of the internal assessment. Weekly assessments are necessary on all theoretical work and this can be done by short assessments that can be incorporated into the year mark. Short assessments are important but cannot replace the final of each topic or the semester assessment. The theoretical component can be assessed individually or in groups using a variety of assessment instruments.

3.1.2 Practical/Application Component

The practical component of Office Practice will form 60 percent of the internal assessment. All practical components must be indicated in a Portfolio of Evidence (PoE).

Practical assessment will be done in the simulated enterprise (SIM) and evidence will be placed in the PoE. Integration of practical and theory will be assessed throughout the year in the form of task case studies and practical application exercises.

- **Some examples of practical assessments include, but are not limited to:**

- Presentations (lectures, demonstrations, group discussions and activities, practical work, observation, role play, self activity, judging and evaluation)
- Use of aids
- Exhibitions
- Visits
- Guest speaker presentations
- Research
- Structured environment

- **Definition of the term “Structured Environment”**

Structured environment for the purposes of assessment refers to an actual or simulated workplace, or workshop environment. It is advised that a practicum room is available on each campus for practical assessment.

- **Evidence in practical/application assessments**

All evidence pertaining to evaluation of practical work must be reflected in the students' Portfolio of Evidence. The tools and instruments constructed and used for the purpose of conducting such assessments must be clear from evidence contained in the PoE.

3.1.3 Processing of internal assessment mark for the year

A year mark out of 100 is calculated by adding the marks of the theoretical component and the practical component of the internal continuous assessment.

3.1.4 Moderation of internal assessment mark

Internal assessment is subject to both internal and external moderation procedures as contained in the *National Examinations Policy for FET College Programmes*.

3.2 External assessment (50 percent)

A national examination is conducted annually in October or November by means of a paper/s set internally and marked and moderated externally.

Details in respect of external assessment are contained in the *Assessment Guidelines: Office Practice* (Level 3).

4 WEIGHTED VALUES OF TOPICS

TOPICS	WEIGHTED VALUE
1. Plan, monitor and control an information system	10%
2. Monitor and control office supplies	10%
3. Handling of Petty Cash	20%
4. Manage a diary for self and others	20%
5. Coordinate meetings, minor events and travel arrangements	10%
6. Monitor and control the receiving and satisfaction of visitors	10%
7. Process incoming and outgoing telephone calls	10%
8. Monitor the reception area	10%
TOTAL	100

5 CALCULATION OF FINAL MARK

Internal assessment: Student's mark/100 x 50 = a mark out of 50 (a)

Examination mark: Student's mark/100 x 50 = a mark out of 50 (b)

Final mark: (a) + (b) = a mark out of 100

All marks are systematically processed and accurately recorded to be available as hard copy evidence for, amongst others, purposes of moderation and verification, as well as for purposes of reporting.

6 PASS REQUIREMENTS

The student must obtain at least fifty (50) percent in ICASS and fifty (50) percent in the examination.

7 SUBJECT AND LEARNING OUTCOMES

On completion of Office Practice Level 3 the student should have covered the following topics:

- Topic 1: Plan, monitor and control an Information System
- Topic 2: Monitor and control office supplies
- Topic 3: Handling of petty cash
- Topic 4: Manage a diary for self and others
- Topic 5: Co-ordinate meetings, minor events and travel arrangements.
- Topic 6: Monitor and control the receiving and satisfaction of visitors
- Topic 7: Process incoming and outgoing telephone calls
- Topic 8: Monitor the reception area

7.1 Topic 1: Plan, monitor and control an information system

7.1.1 Subject Outcome 1: Plan a storage and retrieval system

Learning Outcome

The student should be able to:

- Identify structural and operational needs.
- Determine procedures for the storage and retrieval of manual and computerised records according to organisational policies and procedures.
- Maintain methodologies and quality control procedures for checking, tracking, and securing.
- Determine the storage and retrieval system.
- Identify archiving processes and procedures for archive storage.
- Determine classification methodologies.

7.1.2 Subject Outcome 2: Monitor the implementation of the filing and retrieval system

Learning Outcomes

The student should be able to:

- Monitor that quality control for sorting, filing and retrieval of documentation is carried out according to organisational requirements.
- Follow organisational policy for transfer, archive and disposal.
- Follow procedures for securing manual and computerised records.
- Explain the importance of maintaining up-to-date and accurate records of paper-based documentation.

7.1.3 Subject Outcome 3: Control the implementation of a filing and retrieval system

Learning Outcomes

The student should be able to:

- Accurately file documents in the required format, location and time frame.
- Identify incorrectly filed documents and file correctly.
- Communicate areas for improvement to the staff member responsible.
- Plan and update the procedures for improving storage and retrieval systems on an ongoing basis.

7.2 Topic 2: Monitor and control office supplies

7.2.1 Subject Outcome 1: Monitor and control the distribution of office supplies

Learning Outcomes

The student should be able to:

- Identify and record office supplies levels.
- Ascertain and compare office supplies levels to required levels.
- Check records for compliance with organisational requirements.
- Take remedial action to rectify office supplies levels.

7.2.2 Subject Outcome 2: Maintain office supplies processes and procedures

Learning Outcomes

The student should be able to:

- Monitor and evaluate office supply processes and procedures.
- Identify and highlight out-of-line situations.
- Take remedial action to correct office supply processes and procedures.
- Identify and recommend areas for improvement to the authorised individuals.

7.3 Topic 3: Handling of Petty Cash

7.3.1 Subject Outcome 1: Disburse money for Petty Cash transactions.

Learning Outcomes

The student should be able to:

- Identify source documents correctly.
- Receive request for Petty Cash, validated and authorised according to company policy.
- Issue authorised cash as per request.
- Receive and reconcile cash slip and change accurately.
- Complete Petty Cash voucher and see that till slip is attached in accordance with purchases made.

7.3.2 Subject Outcome 2: Record Petty Cash transactions.

Learning Outcomes

The student should be able to:

- Number the Petty Cash records in sequence according to company policy.
- Record Petty Cash vouchers correctly in the Petty Cash Book or Petty Cash Journal.
- Total Petty Cash analysis columns accurately.
- File Petty Cash vouchers correctly according to company policy.

7.3.3 Subject Outcome 3: Restore impress amount.

Learning Outcomes

The student should be able to:

- Indicate the amount of the Petty Cash float as required by company.
- Correctly calculate the required amount to restore balance.
- Reconcile money in cash box with Petty Cash Book.
- Request coins and notes according to the required amount.
- Count coins and notes received and place in cash box.

7.3.4 Subject Outcome 4: Adhere to control procedures for Petty Cash.

Learning Outcomes

The student should be able to:

- Secure Petty Cash float according to company policy.
- Reconcile the Petty Cash float with Petty Cash Book.
- Investigate discrepancies and correct within a reasonable period of time.
- Resolve and refer discrepancies arising from the reconciliation of Petty Cash to the appropriate person.

7.4 Topic 4: Manage a diary for self and others

7.4.1 Subject Outcome 1: Demonstrate the ability to manage a diary

Learning Outcomes

The student should be able to:

- Explain the importance and need for accurate diary information.
- Complete diary neatly and legibly.
- Demonstrate evidence that the diary is referred to on a daily basis.

7.4.2 Subject Outcome 2: Organise appointments according to organisational standards.

Learning Outcomes

The student should be able to:

- Prioritise appointments according to requirements.
- Enter appointments correctly and prioritise according to requirements.
- Process cancelled or postponed appointments according to requirements.
- Update diary on an ongoing basis.

7.4.3 Subject Outcome 3: Communicate relevant diary information

Learning Outcomes

The student should be able to:

- Explain the importance of accurately communicating relevant diary information.
- Communicate diary information to all stakeholders within agreed time frames.
- Confirm appointments with all stakeholders within agreed time frames.
- Communicate alterations to the diary to all stakeholders within agreed time frames.

7.5 Topic 5: Coordinate meetings, minor events and travel arrangements

7.5.1 Subject Outcome 1: Identify a date, venue and time for a meeting or event

Learning Outcomes

The student should be able to:

- Provide a range of dates and venues for meeting/event to attendants.
- Provide suitable dates and venues based on responses to ranges
- Book and confirm meeting/event with attendants in writing.
- Forward all related documentation to the attendants.

7.5.2 Subject Outcome 2: Arrange venue and catering

Learning Outcomes

The student should be able to:

- Select and book venue.
- Describe the process of selecting a venue.
- Confirm special arrangements, logistics, meeting room layout and equipment required with the venue provider.
- Describe the processes of selecting a date, caterer and menu, taking into consideration religious and dietary requirements.
- Forward agenda for meeting/event to venue provider and caterers so that correct times for meals and breaks can be adhered to.
- Notify venue and caterers in writing and pay deposits.

7.5.3 Subject Outcome 3: Make travel, car hire and accommodation arrangements

Learning Outcomes

The student should be able to:

- Determine travel, car hire and accommodation requirements for all.
- Confirm that suitable accommodation is secured and confirm booking in writing
- Identify and confirm car hire facilities in writing.
- Forward travel arrangements and all necessary documentation to the attendants.
- Process Invoices relating to travel, car hire and accommodation.
- Process any relevant advance disbursements for travel, car hire or accommodation.

7.5.4 Subject Outcome 4: Assemble and distribute documentation for meeting or event in good/sufficient time to attendants

Learning Outcomes

The student should be able to:

- Establish deadline date for receipt of documentation from contributors according to agreed time frames.
- Communicate deadline date to contributors.
- Assemble, copy and collate documents.
- Timeously distribute relevant documents in hard or electronic form to participants

7.6 Topic 6: Monitor and control the receiving and satisfaction of visitors

7.6.1 Subject Outcome 1: Oversee the reception of visitors.

Learning Outcomes

The student should be able to:

- Receive visitors according to the organisational standards.
- Process all documents/deliveries according to organisational standards.
- Identify, note and record areas of non-conformance for possible remedial action.
- Identify areas of improvements.

7.6.2 Subject Outcome 2: Ensure that visitors are consulted according to organisational requirements.

Learning Outcomes

The student should be able to:

- Consult visitors as per company policy.
- Identify, note and record areas of non-compliance for remedial action.
- Identify remedial actions and present for implementation.

7.6.3 Subject Outcome 3: Monitor visitors' satisfaction

Learning Outcomes

The student should be able to:

- Monitor visitors' satisfaction at pre-determined intervals.
- Obtain feedback from visitors regarding their satisfaction.
- Evaluate and analyse feedback to determine satisfaction levels.
- Take the necessary steps to improve the level of satisfaction.

7.7 Topic 7: Process incoming and outgoing telephone calls.

7.7.1 Subject Outcome 1: Demonstrated knowledge and understanding of telephone etiquette

Learning Outcomes

The student should be able to:

- Describe non-disclosable information and the reasons that it is classified as non-disclosable.
- Emphasise the importance of acknowledging callers and keeping them informed of reasons for delays.
- Describe various ways of finding telephone numbers.
- Explain the difference in the way a person answers their own private telephone and the way the switchboard is answered in terms of assisting customers.
- Describe standard telephone etiquette for answering calls and making calls.
- Describe the use of body language in communicating with others while on a call and the reason why it is important.
- Describe methods for dealing with abusive callers.
- Describe methods for dealing with emergency situations.

7.7.2 Subject Outcome 2: Demonstrate ability to make decisions about practice and to act accordingly.

Learning Outcomes

The student should be able to:

- Prepare all necessary documentation and equipment (computers, writing material, notes etc.) prior to making any outgoing calls.
- Given a telephonic request from a customer, decide whether to help or to transfer the call to another person in the organisation and explain why.
- Ask probing questions, discover the purpose of the call and transfer the caller to another person who may be more able to assist.
- Take messages for others in the organisation (including whom the message is for, who called, the date and time, a short description of the call and contact details of the caller).
- Given the nature of the call, decide whether to take a detailed message or to offer to have the customer called back.
- Given incoming calls, transfers and outgoing calls, deal with the callers politely and in keeping with the organisation's image and standard telephone etiquette.
- Deal with calls quickly and politely, keeping other calls holding as little as possible.
- Given a specific situation, decide what information is disclosable or non-disclosable and explain why.

7.7.3 Subject Outcome 3: Demonstrate ability to learn from own actions and to adapt performance.

Learning Outcomes

The student should be able to:

- Given that a new switchboard is being introduced into the organisation, suggest ways to learn the new system quickly and become competent.

7.8 Topic 8: Monitor the reception area

7.8.1 Subject Outcome 1: Monitor the maintenance of a clean and safe reception area as per organisational requirements

Learning Outcomes

The student should be able to:

- Maintain the implementation of housekeeping standards according to workplace policy.
- Maintain housekeeping operations to ensure no disruption to operational services.
- Identify areas not meeting the required standards and record for possible remedial action.
- Require rectifying actions and procedures so that substandard areas are identified and monitored to ensure that minimum standards are met.

7.8.2 Subject Outcome 2: Monitor presentation of reception area

Learning Outcomes

The student should be able to:

- Maintain presentation of reception area according to organisational standards.
- Identify, note and record areas of non-conformance for possible remedial action.
- Identify and present remedial actions for implementation.
- Communicate areas of improvement.

7.8.3 Subject Outcome 3: Monitor the implementation of security procedures in reception area

Learning Outcomes

The student should be able to:

- Brief all reception personnel verbally on security procedures and provide them with a written summary
- Obtain visitors' cards and permits from security personnel.
- Monitor and maintain firearm procedures per workplace policy.
- Report and rectify discrepancies and problems to ensure safety of workplace.

8 RESOURCE NEEDS FOR THE TEACHING OF OFFICE PRACTICE - LEVEL 3

8.1 Physical resources

- **Practicum room: (Simulated room)**

- A simulated enterprise in which students can gain practical experience within an office environment, with a simulated office environment and essential electronic equipment, e.g. adding machine, cash registers calculators, filing cabinets
- Computer and data projector to electronically project data must be available to facilitator; or
- The facilitator must provide students with examples to be completed in practical assignments.
- The latest developments in electronic equipment must be available.

- **Media centre**

- Availability of computers and printers for students to complete assignments/case studies and do research.
- Access to Internet for students.
- Trading magazines, daily newspapers and subject related reference books for research by students.
- Subject related DVDs/videos
- List of guest speakers
- List of website addresses for subject related research.
- Legislation/Acts for use by lecturers during lessons and students for research purposes.
- Research software e.g. Encarta.
- Stock room to store video/DVD machines, televisions, etc.
- Security for stock room

- **Class room**

- Flash disk for facilitator to store information.
- White board, black board
- Desks for students big enough to work on own and in groups

8.2 Human resources

- **Lecturer/facilitator:**

- Applicable 3 year diploma; or
- Applicable 4 year degree; and/ or
- Diploma/Degree in education
- Declared competence as assessor and/or moderator
- Training in OBE
- Advanced knowledge and skills of Office Data Processing.

8.3 Other Resources

- Text books
- Lever arch file for each student to serve as portfolio of evidence
- Subscription fees for Internet, industry magazines, newspapers.
- Computer disk for each student.