



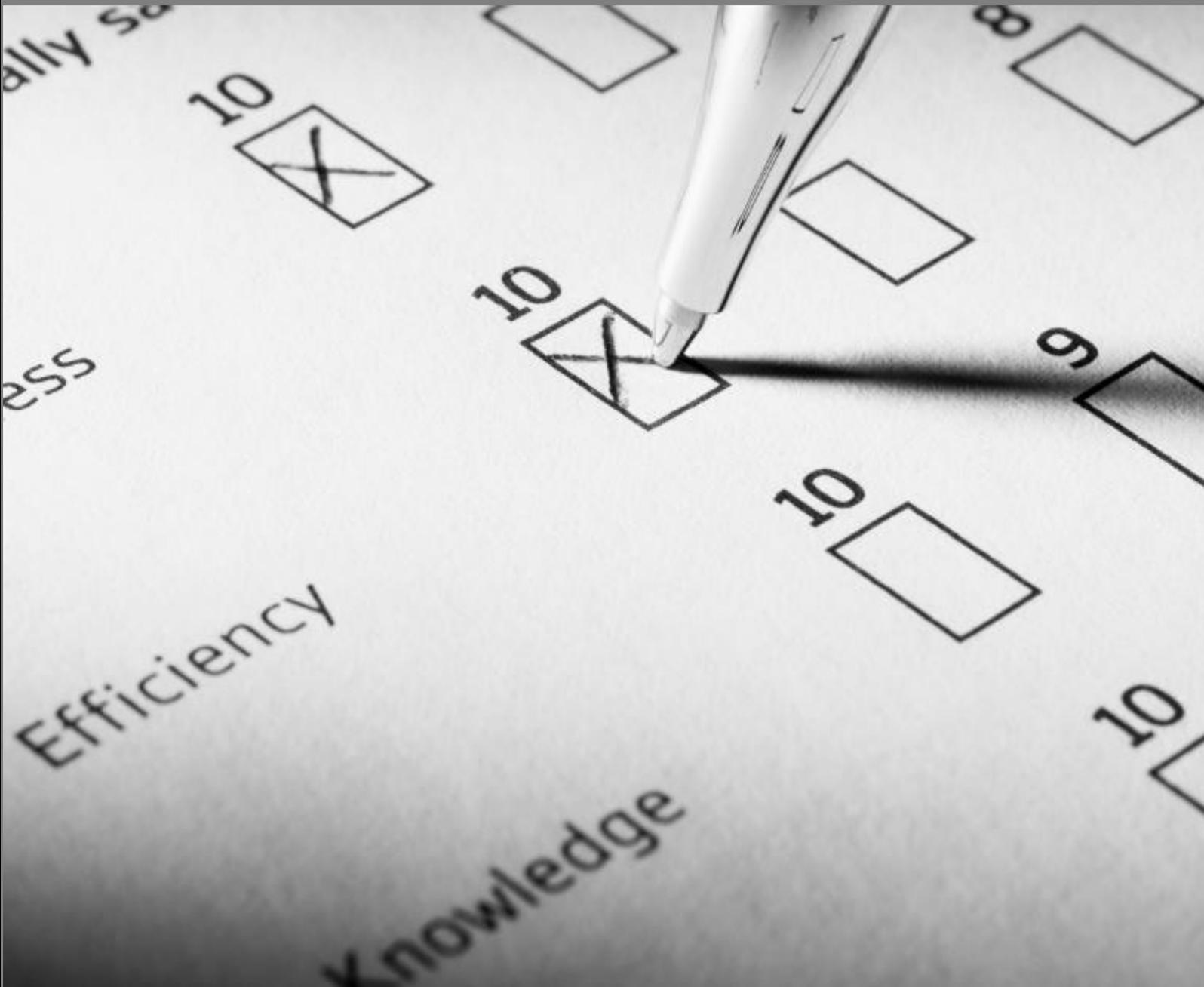
Perform clerical procedures

D1.HRS.CL1.11

D1.HOT.CL1.05

D2.TCC.CL1.09

Assessor Manual



Perform clerical procedures

D1.HRS.CL1.11

D1.HOT.CL1.05

D2.TCC.CL1.09

Assessor Manual



William
Angliss
Institute

Specialist centre
for foods, tourism
& hospitality

Project Base

William Angliss Institute of TAFE
555 La Trobe Street
Melbourne 3000 Victoria
Telephone: (03) 9606 2111
Facsimile: (03) 9670 1330

Acknowledgements

Project Director: Wayne Crosbie
Chief Writer: Alan Hickman
Subject Writer: Birgitta March
Project Manager/ Editor: Alan Maguire
DTP/Production: Daniel Chee, Mai Vu, Jirayu Thangcharoensamut, Kaly Quach

The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.

The ASEAN Secretariat is based in Jakarta, Indonesia.

General Information on ASEAN appears online at the ASEAN Website: www.asean.org.

All text is produced by William Angliss Institute of TAFE for the ASEAN Project on "Toolbox Development for Priority Tourism Labour Division".

This publication is supported by the Australian Government's aid program through the ASEAN-Australia Development Cooperation Program Phase II (AADCP II).

Copyright: Association of Southeast Asian Nations (ASEAN) 2012.

All rights reserved.

Disclaimer

Every effort has been made to ensure that this publication is free from errors or omissions. However, you should conduct your own enquiries and seek professional advice before relying on any fact, statement or matter contained in this book. The ASEAN Secretariat and William Angliss Institute of TAFE are not responsible for any injury, loss or damage as a result of material included or omitted from this course. Information in this module is current at the time of publication. Time of publication is indicated in the date stamp at the bottom of each page.

Some images appearing in this resource have been purchased from stock photography suppliers Shutterstock and iStockphoto and other third party copyright owners and as such are non-transferable and non-exclusive. Clip arts, font images and illustrations used are from the Microsoft Office Clip Art and Media Library. Some images have been provided by and are the property of William Angliss Institute.

Additional images have been sourced from Flickr and SXC and are used under Creative Commons licence: <http://creativecommons.org/licenses/by/2.0/deed.en>

File name: AM_PerformClericalProcedure_refined.docx



William
Angliss
Institute

Specialist centre
for foods, tourism
& hospitality

Table of Contents

Competency Based Assessment (CBA) – An introduction for assessors.....	1
Competency Standard	11
Oral Questions	15
Written Questions	19
Answers to Written Questions	29
Observation Checklist	39
Third Party Statement	41
Competency Recording Sheet	43

Competency Based Assessment (CBA) – An introduction for assessors

Assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency.

Suggested assessment methods

For each unit of competency a number of assessment tools have been identified including:

- Work Projects
- Oral Questions
- Written Questions
- Third Party Statements
- Observation Checklists.

Instructions and Evidence Recording Sheets have been identified in this Assessment Manual for use by Assessors.

Alternative assessment methods

Whilst the above mentioned assessment methods are suggested assessment methods, the assessor may use an alternate method of assessment taking into account:

- a) The nature of the unit
- b) The strengths of participants
- c) The number of participants in the class
- d) Time required to complete assessments
- e) Time dedicated to assessment
- f) Equipment and resources required.

Alternate assessment methods include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals/slides/audiotapes
- Log books

- Projects and Role plays
- Group projects
- Recognition of Prior Learning.

Whilst there is no specific instruction or evidence collection documents for all the alternative assessment methods, assessors can record competency in the 'Other' section within the 'Competency Recording Sheet'.

Selection of assessment methods

Each assessor will determine the combination of Assessment Methods to be used to determine Competency for each Competency Unit on a student by student basis.

'Sufficient' evidence to support the 'Pass Competent'/'Not Yet Competent' decision must be captured.

In practice this means a minimum of 2 – 3 Assessment Methods for each candidate for each Competency Element is suggested.

At least one method should provide evidence of practical demonstration of competence.

The following assessment methods deemed to provide evidence of practical demonstration of competence include:

- Practical Work Projects
- Third Party Statement
- Observation Checklist.

Assessing competency

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- 'Pass Competent' (PC)
- 'Not Yet Competent' (NYC).

Pass Competent (PC)

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as 'Pass Competent' (PC).

The assessor will award a 'Pass Competent' (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

'Not Yet Competent' (NYC)

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be 'Not Yet Competent' (NYC).

This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

- a) Undertake further training or instruction
- b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.

Regional Qualifications Framework and Skills Recognition System

The 'Regional Qualifications Framework and Skills Recognition System', also known as the 'RQFSRS' is the overriding educational framework for the ASEAN region.

The purpose of this framework is to provide:

- A standardised teaching and assessment framework
- Mutual recognition of participant achievement across the ASEAN region. This includes achievement in individual Units of Competency or qualifications as a whole.

The role of the 'RQFSRS' is to provide, ensure and maintain 'quality assurance' across all countries and educational providers across the ASEAN region.

Recognition of Prior Learning (RPL)

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

This process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)
- Skills auditing
- Gap analysis and training
- Credit transfer.

Code of practice for assessors

This Code of Practice provides:

- Assessors with direction on the standard of practice expected of them
- Candidates with assurance of the standards of practice expected of assessors
- Employers with assurance of the standards maintained in the conduct of assessment.

The Code detailed below is based on the International Code of Ethics and Practice (The National Council for Measurement in Education [NCME]):

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity
- Potential forms of conflict of interest in the assessment process and/or outcomes are identified and appropriate referrals are made, if necessary
- All forms of harassment are avoided throughout the planning, conducting, reviewing and reporting of the assessment outcomes
- The rights of the candidate are protected during and after the assessment
- Personal and interpersonal factors that are not relevant to the assessment of competency must not influence the assessment outcomes

- The candidate is made aware of rights and process of appeal
- Evidence that is gathered during the assessment is verified for validity, reliability, authenticity, sufficiency and currency
- Assessment decisions are based on available evidence that can be produced and verified by another assessor
- Assessments are conducted within the boundaries of the assessment system policies and procedures
- Formal agreement is obtained from both the candidate and the assessor that the assessment was carried out in accordance with agreed procedures
- The candidate is informed of all assessment reporting processes prior to the assessment
- The candidate is informed of all known potential consequences of decisions arising from an assessment, prior to the assessment
- Confidentiality is maintained regarding assessment results
- The assessment results are used consistently with the purposes explained to the candidate
- Opportunities are created for technical assistance in planning, conducting and reviewing assessment procedures and outcomes.

Instructions and checklist for assessors

Instructions

General instructions for the assessment:

- Assessment should be conducted at a scheduled time that has been notified to the candidate
- Facilitators must ensure participants are made aware of the need to complete assessments and attend assessment sessions
- If a participant is unable to attend a scheduled session, they must make arrangements with the Assessor to undertake the assessment at an alternative time
- At the end of the assessment the Assessor must give feedback and advise the participant on their PC/NYC status
- Complete the relevant documentation and submit to the appropriate department.

Preparation

- Gain familiarity with the Unit of Competency, Elements of Competency and the Performance Criteria expected
- Study details assessment documentation and requirements
- Brief candidate regarding all assessment criteria and requirements.

Briefing checklist

- Begin the assessment by implementing the following checklist and then invite the candidate to proceed with assessment.

Checklist for Assessors

	Tick (✓)	Remarks
Prior to the assessment I have:		
Ensured the candidate is informed about the venue and schedule of assessment.		
Received current copies of the performance criteria to be assessed, assessment plan, evidence gathering plan, assessment checklist, appeal form and the company's standard operating procedures (SOP).		
Reviewed the performance criteria and evidence plan to ensure I clearly understood the instructions and the requirements of the assessment process.		
Identified and accommodated any special needs of the candidate.		
Checked the set-up and resources for the assessment.		
During the assessment I have:		
Introduced myself and confirmed identities of candidates.		
Put candidates at ease by being friendly and helpful.		
Explained to candidates the purpose, context and benefits of the assessment.		
Ensured candidates understood the assessment process and all attendant procedures.		
Provided candidates with an overview of performance criteria to be assessed.		
Explained the results reporting procedure.		
Encouraged candidates to seek clarifications if in doubt.		
Asked candidates for feedback on the assessment.		
Explained legal, safety and ethical issues, if applicable.		
After the assessment I have:		
Ensured candidate is given constructive feedback.		
Completed and signed the assessment record.		
Thanked candidate for participating in the assessment.		

Instructions for recording competency

Specifications for recording competency

The following specifications apply to the preparation of Evidence Gathering Plans:

- A Competency Recording Sheet must be prepared for each candidate to ensure and demonstrate all Performance Criteria and Competency Elements are appropriately assessed. This Sheet indicates how the Assessor will gather evidence during their assessment of each candidate
- This Competency Recording Sheet is located at the end of the Assessment Plan
- It is the overriding document to record competency
- The Assessor may vary the Competency Recording Sheet to accommodate practical and individual candidate and/or workplace needs
- Assessor must place a tick (✓) in the 'Assessment Method' columns to identify the methods of assessment to be used for each candidate
- Multiple Competency Elements/Performance Criteria may be assessed at the one time, where appropriate
- The assessor and participant should sign and date the Competency Recording Sheet, when all forms of evidence and assessment have been completed
- The assessor may provide and feedback or clarify questions which the participant may have in regards to the assessment grade or findings
- All documents used to capture evidence must be retained, and attached to the Competency Recording Sheet for each candidate for each Competency Unit.

Instructions for different assessment methods

Specifications for work project assessment

These guidelines concern the use of work projects.

The work projects identified in the Training Manuals involve a range of tasks, to be performed at the discretion of the Assessor.

Work project tasks can be completed through any form of assessment as identified in the Trainer and Trainee Manuals and stated at the start of this section.

Assessors should follow these guidelines:

- Review the Work Projects at the end of each 'Element of Competency' in the Trainee Manual to ensure you understand the content and what is expected
- Prepare sufficient resources for the completion of work activities including:
 - Time – whether in scheduled delivery hours or suggested time participants to spend outside of class hours
 - Resources – this may involve technical equipment, computer, internet access, stationery and other supplementary materials and documents
- Prepare assessment location (if done in class) making it conducive to assessment
- Explain Work Projects assessment to candidate, at the start of each Element of Competency. This ensures that participants are aware of what is expected and can collate information as delivery takes place

- Assessors can use the following phrase as a guide (where an 'X' is identified, please input appropriate information):

“At the end of each Element of Competency there are Work Projects which must be completed. These projects require different tasks that must be completed.

These work projects are part of the formal assessment for the unit of competency titled X:

 - You are required to complete these activities:
 - a) *Using the 'X' method of assessment*
 - b) *At 'X' location*
 - c) *You will have 'X time period' for this assessment*
 - You are required to compile information in a format that you feel is appropriate to the assessment
 - Do you have any questions about this assessment?”
- Commence Work Project assessment:
 - The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
 - Participants complete work projects in the most appropriate format
 - Participants must submit Work Project evidence to the assessor before the scheduled due date
- Assessor must assess the participant's evidence against the competency standards specified in each Element of Competency and their own understanding. The assessor can determine if the participant has provided evidence to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Oral Question Assessment

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:
 - Enter Student name
 - Enter Assessor name
 - Enter Location
- Familiarise self with Questions to be asked
- Prepare assessment location (table and chairs) making it conducive to assessment
- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

“These oral questions are part of the formal assessment for the unit of competency titled X.

There are X questions and you are required to answer all of them to the best of your ability and I will record whether or not you have answered correctly.

We have 60 minutes for this assessment.

- I will give you feedback at the end of the assessment
- Do you have any questions about this assessment?”
- Commence Oral Questioning assessment:
 - Complete Assessment Record for the Oral Questioning by:
 - a) Ticking PC or NYC, as appropriate
 - b) Entering ‘Remarks’ as required
 - c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Written Question Assessment

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

- Familiarise self with Questions and Answers provided
- Print and distribute copies of ‘Written Questions’ for participants. Ideally this should take place with adequate time for participants to answer all questions before the expected due date
- Explain Written Questioning assessment to candidate, using the following phrase as a guide (where a ‘X’ is identified, please input appropriate information):

“These written questions are part of the formal assessment for the unit of competency titled X.

There are X questions and you are required to answer all of them to the best of your ability.

You may refer to your subject materials, however where possible try to utilise your existing knowledge when answering questions.

Where you are unsure of questions, please ask the Assessor for further instruction. This may be answering the question orally or asking the assessor to redefine the question.

We have X time for this assessment:

- The due date for completion of this assessment is X
- On this date you must forward the completed questions to the assessor by X time on the date of X
- Do you have any questions about this assessment?”
- The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
- Participants may record written answers (where possible)
- Participants must submit the written answers to the assessor before the scheduled due date

- Assessor must assess the participant's written answers against the model answers provided as a guide, or their own understanding. The assessor can determine if the participant has answered the questions to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Observation Checklist

These specifications apply to the use of the Observation Checklist in determining competency for candidates.

Only an approved assessor is authorised to complete the Observation Checklist.

The assessor is required to observe the participant, ideally in a simulated environment or their practical workplace setting and record their performance (or otherwise) of the competencies listed on the Observation Checklist for the Competency Unit.

To complete the Observation Checklist the Assessor must:

- Insert name of candidate
- Insert assessor name
- Insert identify of location where observations are being undertaken
- Insert date/s of observations – may be single date or multiple dates
- Place a tick in either the 'Yes' or 'No' box for each listed Performance Criteria to indicate the candidate has demonstrated/not demonstrated that skill
- Provide written (and verbal) feedback to candidate – as/if appropriate
- Sign and date the form
- Present form to candidate for them to sign and date
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Observation Checklist.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the participant.

Specifications for Third Party Statement

These specifications relate to the use of a relevant workplace person to assist in determining competency for candidates.

The Third Party Statement is to be supplied by the assessor to a person in the workplace who supervises and/or works closely with the participant.

This may be their Supervisor, the venue manager, the Department Manager or similar.

The Third Party Statement asks the Supervisor to record what they believe to be the competencies of the participant based on their workplace experience of the participant. This experience may be gained through observation of their workplace performance, feedback from others, inspection of candidate's work etc.

A meeting must take place between the Assessor and the Third Party to explain and demonstrate the use of the Third Party Statement.

To complete the Third Party Verification Statement the Assessor must:

- Insert candidate name
- Insert name and contact details of the Third Party
- Tick the box to indicate the relationship of the Third Party to the candidate
- Present the partially completed form to the Third Party for them to finalise
- Collect the completed form from the Third Party
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Third Party Statement.

The Third Party must:

- Record their belief regarding candidate ability/competency as either:
 - Pass Competent = Yes
 - Not Yet Competent = No
 - Unsure about whether candidate is competent or not = Not Sure
- Meet briefly with the assessor to discuss and/or clarify the form.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the candidate.

A separate Third Party Statement is required for each Competency Unit undertaken by the candidate.

Competency Standard

UNIT TITLE: PERFORM CLERICAL PROCEDURES		NOMINAL HOURS: 15 hours
UNIT NUMBER: D1.HRS.CL1 11, D1.HOT.CL1.05, D2.TCC.CL1.09		
UNIT DESCRIPTOR: This unit deals with the skills and knowledge required to perform clerical procedures in a range of settings within the six labour divisions of the hotel and travel industries.		
ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE	
<p>Element 1: Process office documents</p> <p>1.1 <i>Process documents</i> with appropriate office equipment in accordance with enterprise procedures and within designated timelines</p> <p>1.2 Identify and rectify and/or report malfunctions promptly in accordance with enterprise procedures</p> <p>1.3 Use <i>office equipment</i> to process documents</p> <p>Element 2: Draft correspondence</p> <p>2.1 Write text using clear and concise language</p> <p>2.2 Ensure text is without spelling, punctuation and/or grammatical errors</p> <p>2.3 Check information for accuracy prior to sending</p>	<p>Unit Variables</p> <p>The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment</p> <p>This unit applies to performing clerical procedures in a range of settings within the labour divisions of the hotel and travel industries and may include:</p> <ol style="list-style-type: none"> 1. Front Office 2. Housekeeping 3. Food and Beverage Service 4. Food Production 5. Travel Agencies 6. Tour Operation. <p><i>Documents</i> may include:</p> <ul style="list-style-type: none"> • Mail, such as incoming and outgoing correspondence, guest mail and courier 	

Element 3: Maintain document systems

3.1 File/store documents in accordance with enterprise procedures

3.2 Modify and/or update records management systems in accordance with enterprise procedures

- Files, such as customer records, correspondence, financial records, receipts, invoices and orders
- Correspondence, such as letters, facsimiles, memos and reports
- Menus.

Process refers to:

- Collating
- Binding
- Photocopying
- Mailing
- E-mailing
- Filing.

Office equipment may include:

- Photocopier
- Facsimile
- Computer
- Printer
- Scanner.

Assessment Guide

The following skills and knowledge must be assessed as part of this unit:

- The enterprise's policies and procedures in regard to processing office documents
- The enterprise's policies and procedures in regard to using the filing system
- Demonstrated ability to draft correspondence, process documentation and maintain document systems.

Linkages to other units

This is a core unit that underpins effective performance in all other units. Combined training and assessment may be appropriate.

Critical Aspects of Assessment

Evidence of the following is essential:

- Demonstration of the ability to accurately process a range of office documentation within enterprise acceptable timeframes
- Demonstration of the ability to produce documents that are easily understood and error free.

Context of Assessment

- This unit may be assessed on or off the job
- Assessment should include practical demonstration either in the workplace or through a simulation, supported by a range of methods to assess underpinning knowledge
- Assessment must relate to the individual's work area or area of responsibility
- Demonstration of skills across an operating period to address an adequate range of clerical procedures/tasks
- Performance of clerical procedures within typical workplace time constraints.

Resource Implications

Training and assessment to include access to a real or simulated office environment; and access to industry-current equipment.

Assessment Methods

The following methods may be used to assess competency for this unit:

- Observation of candidate performance
- Oral and written questions
- Practical exercises/case studies.

Key Competencies in this Unit		
<i>Level 1 = competence to undertake tasks effectively</i>		
<i>Level 2 = competence to manage tasks</i>		
<i>Level 3 = competence to use concepts for evaluating and reshaping tasks</i>		
Key Competencies	Level	Examples
Collecting, organizing and analysing information	1	Identify what information to include in written correspondence
Communicating ideas and information	1	Produce written correspondence
Planning and organizing activities	1	Plan content and layout of written correspondence; file documentation
Working with others and in teams	1	Produce written documentation for Others
Using mathematical ideas and techniques	-	
Solving problems	1	Resolve equipment malfunctions
Using technology	1	Use routine software to produce routine office documents

Oral Questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Perform clerical procedures D1.HRS.CL1 11, D1.HOT.CL1.05, D2.TCC.CL1.09
Instructions	<ol style="list-style-type: none"> 1. Ask student questions from the attached list to confirm knowledge, as necessary 2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC') 3. Write short-form student answer in the space provided for each question.

Questions	Response	
	PC	NYC
1. What enterprise procedures and timelines apply to the processing of documents in your workplace?	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
2. The computer you use to process documents in your workplace is not working properly: what will you do to address this problem and get it fixed?	<input type="checkbox"/>	<input type="checkbox"/>
3. What items of equipment do you use to process documents in your workplace? Pick one and tell me what you use it for, and explain briefly how you use it.	<input type="checkbox"/>	<input type="checkbox"/>
4. How do you ensure correspondence/documents you produce in the workplace contain clear and concise language?	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
5. What do you do to ensure the correspondence/documents you produce in the workplace are free from spelling, grammatical and punctuation errors?	<input type="checkbox"/>	<input type="checkbox"/>
6. Tell me what you do to ensure correspondence you produce in the workplace is accurate before you send it to the intended recipient.	<input type="checkbox"/>	<input type="checkbox"/>
7. Describe the filing/records management system used in your workplace to file/maintain correspondence and/or documents you produce.	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
8. What enterprise requirements apply at your workplace in relation to the updating of the records management system being used?	<input type="checkbox"/>	<input type="checkbox"/>

Written Questions

**Perform clerical procedures –
D1.HRS.CL1 11, D1.HOT.CL1.05, D2.TCC.CL1.09**

Student Name: _____

Answer all the following questions and submit to your Trainer.

- Imagine you work in the front office of a large multi-national hotel. Which 5 types of office documents may you come in contact with?

- Explain the following acronyms (abbreviated words) and terms: PC, VDU, CPU, Hardware and Software

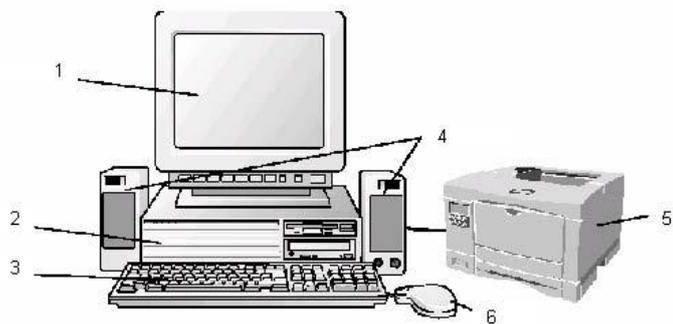
PC	
VDU	
CPU	
Hardware	
Software	

- Advise (in the boxes) whether you consider the following to be hardware or software

Item	Hardware or software
	
	
	
	

Item	Hardware or software
	
	
	
	
	

4. Identify and name the parts of the computer below:



1.
2.
3.
4.
5.
6.

5. Draw lines to match the following:

ROM	Megabyte
Mb	Random Access Memory
RAM	Read Only Memory
Byte	8 bits

6. Explain the following acronyms and write descriptions:

DVD	
CD-R	
CD-RW	

7. List three advantages and three disadvantages of using a laptop instead of a desktop computer.

8. Give an example of 5 technology consumables.

9. Complete the following sentences:

- The cheapest type of storage media are _____ although they are already obsolete in some countries.
- The most common type of storage is on a _____.
- A _____ allows you to store up to 750mB of data and is in the low/medium cost.

10. What routine maintenance should be carried out on the following pieces of office equipment?

Mouse:	
Keyboard:	
Printer:	
Scanner:	
Computer to ensure that it runs smoothly:	

11. Name the software you would use to complete the following tasks

Type up a newsletter	
Prepare a budget for next year	
Create a list of clients	
Create a slide show for a board meeting	
Communicate with head office	
Manage files on the computer	

12. Explain what you would use the following computer technology/devices for

Digital camera:	
Zip drive:	
External modem/ modem card:	
Scanner:	

13. List the two most important things to consider when writing a letter:

14. Why is research important when writing a business document?

15. When writing a business letter (outside of The United States of America), would you use verbs ending in –ise or –ize?

Socialise/ Socialize?	
Organise/ Organize?	
Verbalise/ Verbalize?	
Organization/ Organisation?	

16. Explain how a modified letter from a full block or semi-block style looks

17. List the essential parts of a business letter

18. List some complimentary parts of a business letter

19. Which complimentary close matches which salutation?

Dear Yun,	Yours sincerely
Dear Sir,	Yours faithfully
Dear Mrs. Ang	Yours sincerely,

20. If you have to send a note to a colleague in another department, will you write a memo or a letter on letterhead?

21. If you were to write a routine letter, how would you organise your information? List the three steps and give an example. Bring in a sample of a routine letter to discuss in class.

22. Open up your personal email account (Yahoo, gmail, etc.) and add a personal signature. Your signature must include your first name, last name, title, address and phone number. Print off and give copy to your trainer.

23. Give an alternative (i.e. a simpler, more common word) for Frequently, In respect of, Occasioned by, Have the capability of, Utilise

24. When producing a new document, what is the rule of the 7 Cs? Give an example of each C

25. How do you complete an envelope using Microsoft Word?

26. How do you fold a letter prior to putting it into an envelope?

27. Use the Word Research Tool (review tab) OR any dictionary tools as recommended in Element 2 and research the following words. Once completed, ensure the attached text has the correct words. Run a spell check and ensure these words are in your dictionary. If not, add these please.

Words	Explanation
"Affect"	
"Effect"	
"Then"	
"Than"	
"Your"	
"Their"	
"They're"	
"There"	
"To"	
"Too"	
"Its"	
"It's"	

"Extract from the Vietnamese Gazette"

It's/Its with great sadness we have to report that our restaurant was **affected/effected** by the heavy storm last night. **There/their/they're** will not be a breakfast session for that reason. The lunch session may be **affected/effected too/to**. We count on your understanding. Once the insurance company has evaluated the damage, we can **then/than** make a decision about the upcoming days.

28. List two electronic storage devices

29. Imagine your computer is frozen, what should you be doing?

30. Imagine you work for a large hotel in Singapore using an alphabetical filing system. How would you file the following files, observing the alphabetical filing rules?

Rule 1: File by name in terms of the first letter

Hotel guest names: Wang, Chang, Li, Jang

Correct filing order: _____

Rule 2: If the first letters are the same, file in terms of the second letter.

Hotel guest names: Wang, Wong, Wing, Jang, Jin

Correct filing order: _____

Rule 3: If last names are the same, file in terms of the initial

Hotel guest names: Nguyen AC, Nguyen BS, Nguyen ZW, Nguyen CE

Correct filing order: _____

Rule 4: When there are two surnames, file under the first surname.

Hotel guest names: Trang & Dang, Dinh & Lam, Trinh & Truong, Pho&Nghiem

Correct filing order: _____

Rule 5: Mac Mc & M' all filed as Mac; St and Saint all filed as Saint

Hotel guest names: Saint Jean-Pierre, Mc Nair, MacDonald, St Marie'

Correct filing order: _____

Rule 6: When the file does not have the guest's name, file by the MOST IMPORTANT

WORD in the name or by the place/geographical location

Hotel guest names: Apple Computers, The Star, Limthongkul printers, Bangkok city council

Correct filing order: _____

Answers to Written Questions

Perform clerical procedures – D1.HRS.CL1 11, D1.HOT.CL1.05, D2.TCC.CL1.09

The following are model answers only – Trainers/Assessors must use discretion when determining whether or not an answer provided by a Student is acceptable or not.

1. **Imagine you work in the front office of a large multi-national hotel. Which 5 types of office documents may you come in contact with? A username is a name created by the system administrator to distinguish each user from the other user. A password is a set of characters to prove the person is the user.**

Guest mail, customer records, incoming and outgoing correspondence, letters, facsimiles, memos, reports, menus, banquet orders, financial records, invoices, and receipts.

2. **Explain the following acronyms (abbreviated words) and terms: PC, VDU, CPU, Hardware and Software**

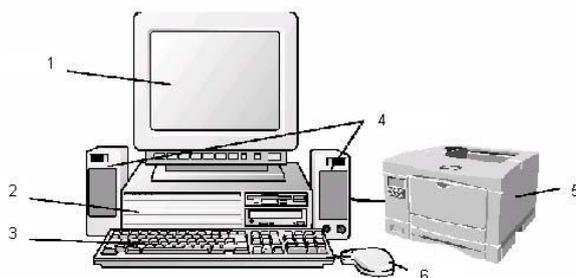
PC:	Visual Display unit
VDU:	Central Processing unit, also referred to as the “processor”
CPU:	The physical components of a computer system - everything that you can touch
Hardware:	The programs used on a computer
Software:	Visual Display unit

3. **Advise (in the boxes) whether you consider the following to be hardware or software:**

Item	Hardware or software
	
	
	
	
	

Item	Hardware or software
	
	
	
	

4. Identify and name the parts of the computer below:



1. Screen/monitor
2. Modem
3. Keyboard
4. Speakers
5. Printer
6. Mouse

5. Draw lines to match the following:

ROM	Random Access Memory
Mb	Megabyte
RAM	Read Only Memory
Byte	8 bits

6. Explain the following acronyms and write descriptions:

DVD:	Digital Versatile Disc
CD-R:	Compact Disc Recordable
CD-RW:	Compact Disc Re-writable

7. List three advantages and three disadvantages of using a laptop instead of a desktop computer.

Advantages:

- You can take it anywhere
- It is lightweight
- Very convenient.

Disadvantages:

- Not as fast as a fixed PC
- Battery life may not be long enough
- Easily damaged if not taken care of.

8. Give an example of 5 technology consumables.

Printer ribbons and cartridges, CD-ROMs, floppy disks, toner cartridges and back-up tapes

9. Complete the following sentences:

- The cheapest type of storage media are floppy disks although they are already obsolete in some countries.
- The most common type of storage is on a hard drive.
- A zip disk allows you to store up to 750mB of data and is in the low/medium cost.

10. What routine maintenance should be carried out on the following pieces of office equipment?

Mouse:	Remove and clean the mouse ball and contacts
Keyboard:	Clean any dust and dirt from beneath the keys.
Printer:	Clean the heads, ensure no paper is jammed, replace cartridges
Scanner:	Clean surface
Computer to ensure that it runs smoothly:	Delete unused/unnecessary files and programs

11. Name the software you would use to complete the following tasks

Type up a newsletter	Microsoft Word
Prepare a budget for next year	Excel
Create a list of clients	Excel
Create a slide show for a board meeting	PowerPoint
Communicate with head office	Outlook
Manage files on the computer	Office Manager

12. Explain what you would use the following computer technology/devices for

Digital camera:	Taking photographs and video
Zip drive:	Storing files and images
External modem/ modem card:	Internet connection
Scanner:	To scan and photocopy images and text

13. List the two most important things to consider when writing a letter:

- Who is your audience?
- What is your objective? Is it to enquire, inform, persuade, motivate or to gain visibility?
- Others which are less important are:
What do you want them to do with the information?
Are they supposed to read the entire document or just part of it?
Do they need quick points for reference?

14. Why is research important when writing a business document?

One must plan the content of each paragraph whilst keeping the reader in mind.

15. When writing a business letter (outside of The United States of America), would you use verbs ending in –ise or –ize?

Socialise/ Socialize?	Socialise
Organise/ Organize?	Organise
Verbalise/ Verbalize?	Verbalise
Organization/ Organisation?	Organisation

16. Explain how a modified letter from a full block or semi-block style looks**Modified block style**

Modified block style centres the sender's address, or blocks it to the right margin. The date is placed straight underneath and in line with the sender's address. The inside address and the salutation are placed against the left-hand margin, and each paragraph is blocked against the left-hand margin. The complimentary close and signature blocks are centred in line with the writer's address and the date. Modified block style is a more conservative style of layout.

Full block style

Full block style places each part of the letter against the left-hand margin of the page (the sender's address, the date, the inside address and the salutations are all placed against the left margin). Each paragraph is started against the left margin, as are the complimentary close and the signature block. Supplementary parts such as enclosures, file numbers and copy notations are also blocked. Full block style is an attractive and modern layout that is easy to read.

Semi-block style

Semi-block Style uses the same layout as Modified Block Style, except that the first line of each paragraph is indented from the left-hand margin. This is the most conservative of the three layouts.

17. List the essential parts of a business letter

- Writer's name and address
- Date
- Inside address
- Greeting or salutation
- Body of the letter
- Complimentary close
- Writer's signature and job title or designation.

18. List some complimentary parts of a business letter

- File numbers or Our Reference / your Reference
- Attention Line
- Subject Line
- Enclosure
- Reference Initials
- C.C.
- Staff member's telephone extension

19. Which complimentary close matches which salutation?

Dear Yun,	Yours sincerely
Dear Sir,	Yours faithfully
Dear Mrs. Ang	Yours sincerely,

20. If you have to send a note to a colleague in another department, will you write a memo or a letter on letterhead?

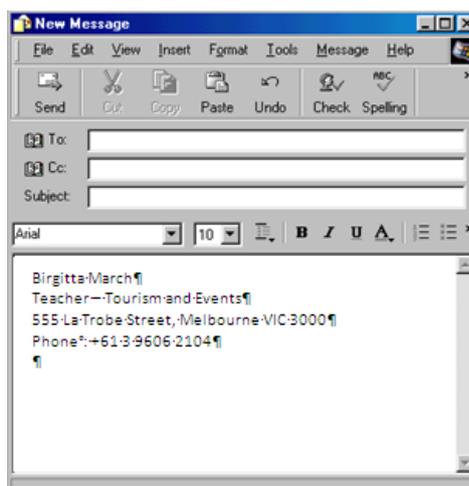
A memo as it is for internal use.

21. If you were to write a routine letter, how would you organise your information? List the three steps and give an example. Bring in a sample of a routine letter to discuss in class.

Opening Paragraph	Middle Paragraphs	Ending Paragraph
Refer to the communication they sent to you	Provide complete information	Include a goodwill close

- Most routine business letters begin by referring to previous correspondence.
- Providing complete information means giving all the necessary details.
- We close our letter with a note of goodwill, to avoid sounding abrupt.

22. Open up your personal email account (Yahoo, gmail, etc.) and add a personal signature. Your signature must include your first name, last name, title, address and phone number. Print off and give copy to your trainer.



23. Give an alternative (i.e. a simpler, more common word) for Frequently, In respect of, Occasioned by, Have the capability of, Utilise

Often, For, Caused by, Can, use

24. When producing a new document, what is the rule of the 7 Cs? Give an example of each C

- Clear - able to be understood in one reading by the recipient (time = money)
- Concise - conveying what has to be stated with a minimum of words, sentences and paragraphs
- Complete - all of the information necessary to understand the correspondence is passed on
- Correct - all of the information conveyed is accurate

- Courteous - your tone is always polite as you are representing your organization and wish to create goodwill
- Clean - this means that there are no coffee stains, liquid paper, or crossing out on your correspondence. It also means that your work is not cluttered and there is plenty of white space so that the document looks appealing and professional
- Checked - this means your work has been examined for spelling mistakes, grammatical mistakes, format and layout and found to be mistake-free.

25. How do you complete an envelope using Microsoft Word?

Go to 'mailings' tab, 'create envelope', then enter the delivery address and return address details.

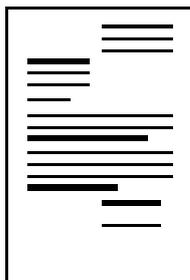
26. How do you fold a letter prior to putting it into an envelope?

Begin with the first page of the letter facing towards you.

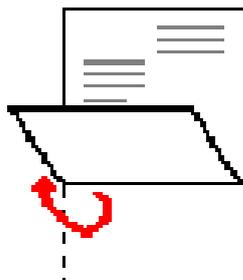
- Crease the letter along a fold one-third from the bottom. Fold the letter up to a point one-third from the top, covering the writing on the letter.
- Make a second horizontal crease one-third from the top of the letter where the bottom of the letter had been folded to. Tuck the bottom into this crease and fold the top over it. The letter will be folded into thirds. It will fit any standard envelope.

If the letter needs to have the address face out an envelope window, make the second fold in the same location but opposite direction. The letter will then be folded in a Z shape and the address can be positioned to face out the window of the envelope.

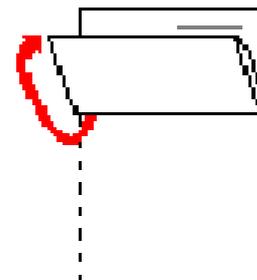
Unfolded



First Fold



Second Fold



27. Use the Word Research Tool (review tab) OR any dictionary tools as recommended in Element 2 and research the following words. Once completed, ensure the attached text has the correct words. Run a spell check and ensure these words are in your dictionary. If not, add these please.

Words	Explanation
"Affect"	(Verb) To have an effect on, an influence on
"Effect"	(Noun) A result, a consequence
"Then"	After that

Words	Explanation
"Than"	Used after a comparative adjective or adverb e.g. more than 500 baht
"Your"	Belonging to a person spoken to
"Their"	Belonging to them
"They're"	They are
"There"	Indicates a place
"To"	Indicates the direction, destination or position of somebody or something e.g. I saw him on the way to school.
"Too"	As well
"Its"	Indicates that something belongs or relates to something e.g. its head is large.
"It's"	It is

"Extract from the Vietnamese Gazette"

It's with great sadness we have to report that our restaurant was **affected** by the heavy storm last night. **There** will not be a breakfast session for that reason. The lunch session may be **affected too**. We count on your understanding. Once the insurance company has evaluated the damage, we can **then** make a decision about the upcoming days.

28. List two electronic storage devices

Suggested answer:

- USB memory sticks
- External hard drives: important in case of computer failure to safeguard large amounts of information
- Floppy disks or CD ROMs: remember that a limited amount of information can be stored here, so it is a good idea to compress the file to accommodate large amounts of data. They are becoming obsolete, in favour of the above.

29. Imagine your computer is frozen, what should you be doing?

- Don't keep clicking
- Don't hit it
- Do wait for a few moments to see if it catches up with your flying fingers.
- If not – then hit Alt+Ctrl+Del. Or the restart button (but only as a last resort.)
- This will re-boot the system for you, but you'll probably lose any information you had not saved
- That's why you should be constantly saving your work as you go along.

30. Imagine you work for a large hotel in Singapore using an alphabetical filing system. How would you file the following files, observing the alphabetical filing rules?

Rule 1: Chang, Jang, Li, Wang

Rule 2: Correct filing order: Jang, Jin, Wang, Wing, Wong

Rule 3: Nguyen AC, Nguyen BS, Nguyen CE, Nguyen ZW

Rule 4: Dinh & Lam, Pho & Nghiem, Trang & Dang, Trinh & Truong,

Rule 5: MacDonald, Mc Nair, Saint Jean-Pierre, St Marie's

Rule 6: Hotel guest names: Apple Computers, Bangkok city council, Limthongkul printers, The Star

Observation Checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Perform clerical procedures D1.HRS.CL1 11, D1.HOT.CL1.05, D2.TCC.CL1.09
Dates of observation	
Instructions	<ol style="list-style-type: none"> 1. Over a period of time observe the student completing each of the following tasks: <ol style="list-style-type: none"> a. Process office documents b. Draft correspondence c. Maintain document systems 2. Enter the date on which the tasks were undertaken 3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise 4. Complete the feedback sections of the form, if required.

Did the candidate	Yes	No
Element 1: Process office documents		
Process documents with appropriate office equipment in accordance with enterprise procedures and within designated timelines	<input type="checkbox"/>	<input type="checkbox"/>
Identify and rectify and/or report malfunctions promptly in accordance with enterprise procedures	<input type="checkbox"/>	<input type="checkbox"/>
Use office equipment to process documents	<input type="checkbox"/>	<input type="checkbox"/>
Element 2: Draft correspondence		
Write text using clear and concise language	<input type="checkbox"/>	<input type="checkbox"/>
Ensure text is without spelling, punctuation and/or grammatical errors	<input type="checkbox"/>	<input type="checkbox"/>
Check information for accuracy prior to sending	<input type="checkbox"/>	<input type="checkbox"/>

Feedback to student and trainer/assessor

Strengths:

Improvements needed:

General comments:

Candidate signature		Date	
Assessor signature		Date	

Third Party Statement

Student name:			
Name of third party:		Contact no	
Relationship to student:	<input type="checkbox"/> Employer <input type="checkbox"/> Supervisor <input type="checkbox"/> Colleague <input type="checkbox"/> Other <i>Please specify: _____</i> <i>Please do not complete the form if you are a relative, close friend or have a conflict of interest]</i>		
Unit of competency:	Perform clerical procedures D1.HRS.CL1.11 D1.HOT.CL1.05 D2.TCC.CL1.09		
<p>The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence.</p> <p>Please answer these questions as a record of their performance while working with you. Thank you for your time.</p>			
Do you believe the trainee has demonstrated the following skills? (tick the correct response]	Yes	No	Not sure
Processes documents using office equipment in accordance with enterprise procedures and within designated timelines			
Identifies and rectifies and/or reports malfunctions of office equipment in accordance with enterprise procedures			
Drafts correspondence using clear and concise language ensuring it contains accurate information and is without spelling, punctuation and/or grammatical errors			
Files/stores documents in accordance with enterprise procedures			
Modifies and/or updates records management systems in accordance with enterprise procedures			

Comments/feedback from Third Party to Trainer/Assessor:

--	--

Third party signature:

Date:

Send to:

Competency Recording Sheet

Name of Student	
Name of Assessor/s	
Unit of Competency	Perform clerical procedures D1.HRS.CL1.11 D1.HOT.CL1.05 D2.TCC.CL1.09
Date assessment commenced	
Date assessment finalised	
Assessment decision	Pass Competent / Not Yet Competent (Circle one)
Follow up action required (Insert additional work and assessment required to achieve competency)	
Comments/observations by assessor/s	

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 1: Process office documents						
Process documents with appropriate office equipment in accordance with enterprise procedures and within designated timelines						
Identify and rectify and/or report malfunctions promptly in accordance with enterprise procedures						
Use office equipment to process documents						
Element 2: Draft correspondence						
Write text using clear and concise language						
Ensure text is without spelling, punctuation and/or grammatical errors						
Check information for accuracy prior to sending						

Element 3: Maintain document systems						
File/store documents in accordance with enterprise procedures						
Modify and/or update records management systems in accordance with enterprise procedures						
Candidate signature:				Date:		
Assessor signature:				Date:		

William
Angliss
Institute

Specialist centre
for foods, tourism
& hospitality



**Australian
Aid** 