



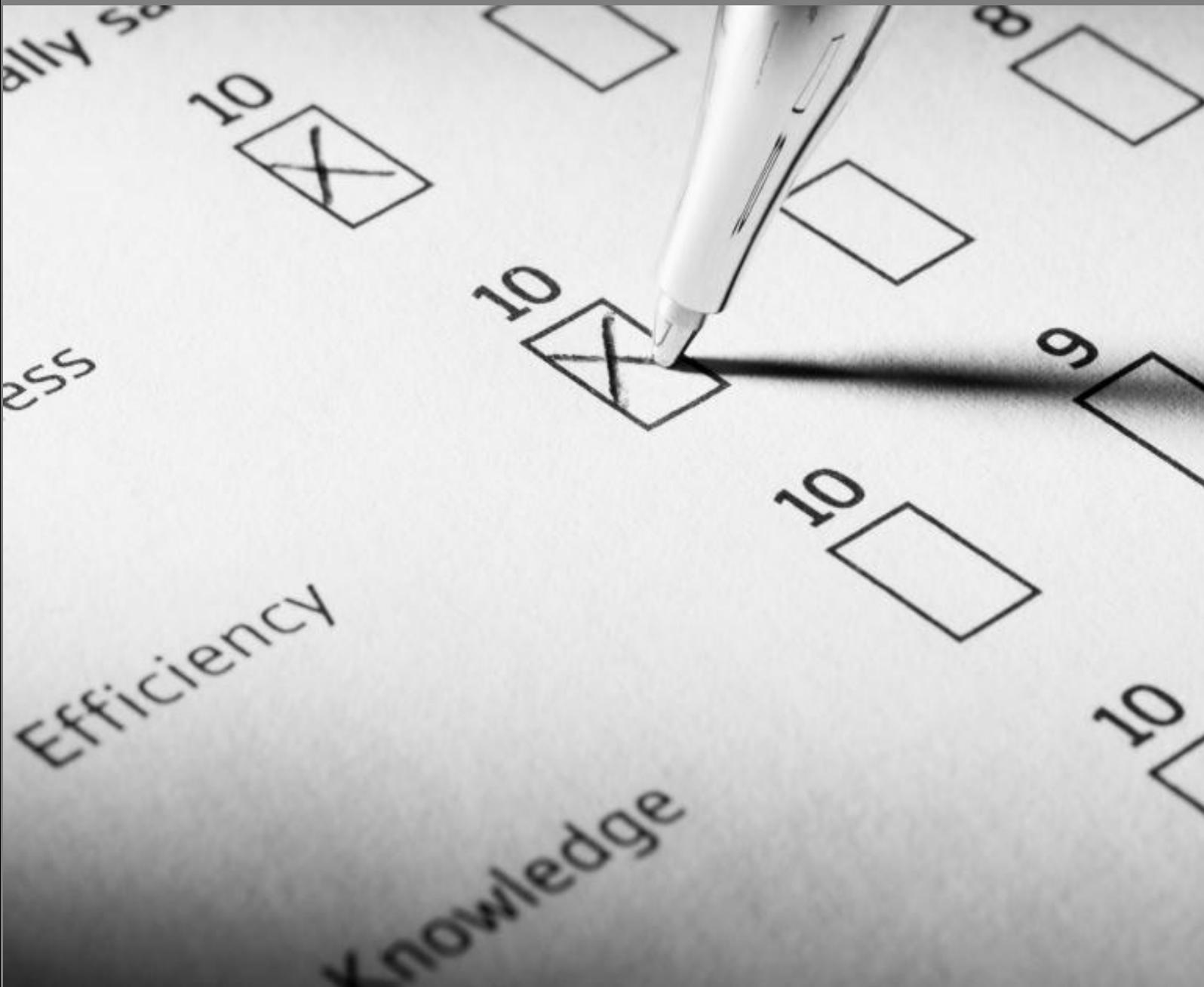
# Produce documents, reports and worksheets on a computer

D1.HGE.CL7.10

D1.HGA.CL6.07

D2.TGA.CL6.02

Assessor Manual





# **Produce documents, reports and worksheets on a computer**

**D1.HGE.CL7.10**

**D1.HGA.CL6.07**

**D2.TGA.CL6.02**

**Assessor Manual**



**William  
Angliss  
Institute**

Specialist centre  
for foods, tourism  
& hospitality

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# 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
<b>Prior to the assessment I have:</b>		
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.		
<b>During the assessment I have:</b>		
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.		

	Tick (✓)	Remarks
<b>After the assessment I have:</b>		
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

<b>UNIT TITLE:</b> PRODUCE DOCUMENTS, REPORTS AND WORKSHEETS ON A COMPUTER		<b>NOMINAL HOURS:</b> 25
<b>UNIT NUMBER:</b> D1.HGE.CL7.10 D1.HGA.CL6.07 D2.TGA.CL6.02		
<b>UNIT DESCRIPTOR:</b> This unit deals with the skills and knowledge required to produce documents, reports and worksheets on a computer in a range of settings within the hotel and travel industries		
<b>ELEMENTS AND PERFORMANCE CRITERIA</b>	<b>UNIT VARIABLE AND ASSESSMENT GUIDE</b>	
<p><b>Element 1: Determine presentation and format of document</b></p> <p><b>1.1</b> Select <i>software</i> appropriate to the nature of the document to be produced</p> <p><b>1.2</b> Select appropriate layout and style of <i>document</i> consistent with <i>enterprise guidelines</i></p> <p><b>1.3</b> Discuss format and presentation of document with <i>appropriate person</i></p> <p><b>Element 2: Produce document</b></p> <p><b>2.1</b> Produce document in required <i>style and format</i></p> <p><b>2.2</b> Produce document within designated timelines</p> <p><b>2.3</b> Save document regularly to avoid loss of data</p>	<p><b>Unit Variables</b></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 all industry sectors that produce documents, reports and worksheets on a computer within the labour divisions of the hotel and travel industries and may include:</p> <ol style="list-style-type: none"> <li>1. Front Office</li> <li>2. Housekeeping</li> <li>3. Food and Beverage Service</li> <li>4. Food Production</li> <li>5. Travel Agencies</li> <li>6. Tour Operation</li> </ol> <p><i>Software</i> may include</p> <ul style="list-style-type: none"> <li>• Desktop publishing</li> <li>• Word processing</li> </ul>	

2.4 Information from same or other software packages is integrated as required

2.5 *Proof read* draft document prior to printing

**Element 3: Print and deliver document**

3.1 Utilise printing function

3.2 *Proofread* document

3.3 Make any necessary modifications to document to improve appearance and meet required specification/s

3.4 Print and present documents according to requirements

- Spreadsheet
- Database
- Presentation.

*Document* may include:

- Reports
- Faxes
- Memorandums
- Worksheets
- Lists
- Letters.

*Enterprise guidelines* may relate to:

- Preferred format of business letters
- Preferred format of memorandums, faxes
- Preferred format of business reports.

*Appropriate person* may relate to:

- Supervisor
- Originator of document
- Colleagues.

*Style and format* may include

- Open or closed punctuation
- Formal or informal communication
- Business letter format
- Report format.

*Proofread* may relate to:

- Utilising spell check function of software
- Utilising grammar check function of software
- Checking page break placement
- Checking hard copy of document
- Checking soft copy of document.

#### **Assessment Guide**

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

- Knowledge of layout of common business documents
- Ability to use basic functions of common software packages
- Ability to use printing equipment.

#### **Linkages To Other Units**

- Prepare business documents
- Perform clerical procedures
- Use common business tools and technology.

#### **Critical Aspects of Assessment**

Evidence of the following is essential:

- Demonstrated ability to access, and utilise computer software to produce documents, reports and worksheets on a computer
- Demonstrated ability to produce documents within designated timelines
- Consistency of performance across a range of situations that demonstrates knowledge, understanding and skill in producing documents, reports and worksheets on a computer.

**Context of Assessment**

This unit may be assessed on or off the job:

- Assessment should include practical demonstration of the production of documents, reports and worksheets in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge
- Assessment must relate to the individual's work area, job role and area of responsibility
- Assessment must include project or work activities that allow the candidate to respond to multiple and varying workplace requirements relevant to work area, job role and area of responsibility that allow the candidate to produce documents, reports and worksheets on a computer within designated timelines.

**Resource Implications**

Training and assessment to include access to a real or simulated workplace; and access to workplace standards, procedures, policies, guidelines, tools, computer equipment and relevant software.

**Assessment Methods**

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

- Case studies
- Observation of practical candidate performance
- Oral and written questions
- Portfolio evidence
- Problem solving
- Third party reports completed by a supervisor
- Project and assignment work.

<b>Key Competencies in this Unit</b>		
<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</i>		
<b>Key Competencies</b>	<b>Level</b>	<b>Examples</b>
Collecting, organising and analysing information	1	Identify the layout for common business documents
Communicating ideas and information	1	Clarify layout requirements with author of material
Planning and organising activities	1	Prioritise work to be produced
Working with others and in teams	1	Ensure that timelines and expectations are clearly understood before commencing task
Using mathematical ideas and techniques	0	-
Solving problems	0	-
Using technology	1	Use computer software to produce documents, reports and worksheets



## Oral Questions

<b>Student name</b>	
<b>Assessor name</b>	
<b>Location/venue</b>	
<b>Unit of competency</b>	Produce documents, reports and worksheets on a computer D1.HGE.CL7.10 D1.HGA.CL6.07 D2.TGA.CL6.02
<b>Instructions</b>	<ol style="list-style-type: none"> <li>1. Ask student questions from the attached list to confirm knowledge, as necessary</li> <li>2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC')</li> <li>3. Write short-form student answer in the space provided for each question.</li> </ol>

Questions	Response	
	PC	NYC
1. What computer skills do staff need to have to prepare documents, reports or worksheets?	<input type="checkbox"/>	<input type="checkbox"/>
2. What are some examples of tasks associated with the processing and production of documents?	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
3. What are some requirements that need to be clarified before preparing documents?	<input type="checkbox"/>	<input type="checkbox"/>
4. Describe the structure when preparing one document of your choice	<input type="checkbox"/>	<input type="checkbox"/>
5. Why is it important to set deadlines when preparing documents?	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
6. Why is it important to save documents on a regular basis?	<input type="checkbox"/>	<input type="checkbox"/>
7. What are examples of different computer operating systems?	<input type="checkbox"/>	<input type="checkbox"/>
8. Why is it important to proof read documents before sending them?	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
9. What is 'print preview' and how is it a helpful tool?	<input type="checkbox"/>	<input type="checkbox"/>
10. Why would you circulate documents to others to review before preparing final copies?	<input type="checkbox"/>	<input type="checkbox"/>
11. What is the purpose of making modifications to documents following proof reading?	<input type="checkbox"/>	<input type="checkbox"/>

Questions	Response	
	PC	NYC
12. Describe the ways a document may be sent overseas	<input type="checkbox"/>	<input type="checkbox"/>



# Written Questions

Produce documents, reports and worksheets on a computer – D1.HGE.CL7.10  
D1.HGA.CL6.07 D2.TGA.CL6.02

Student Name: \_\_\_\_\_

Answer all the following questions and submit to your Trainer.

- 1. What are different software applications that can be used to prepare documents, reports or worksheets?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- 2. What are different technology (hardware) applications that can be used to prepare documents, reports or worksheets?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- 3. What are different types of hospitality documents that are prepared?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

4. Who are potential audiences that may receive documents?

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5. When preparing documents, who may need to be involved in preparing or reviewing them before they are given to the intended audience?

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6. What are the three main writing styles used when preparing documents?

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7. What are three types of documents that can be produced?

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8. What are three steps to good writing?

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9. What are the essential parts to include when writing a letter?

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10. What types of deadlines are there when preparing documents?

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11. What are some timing considerations when deciding deadlines?

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12. What are different ways to store documents?

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13. What are different types of software functions to be utilised when preparing documents?

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14. What are the principles of proof reading?

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15. What are the three methods that can be used to print from word?

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16. What do you check when proof reading?

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17. What are various ways you can circulate documents to others for review and comment before sending final copies?

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18. What types of modifications or activities may take place before printing final copies of a document?

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19. When preparing documents for sending, besides printing, what other activities may take place?

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20. Why should a name and signature be added to a document?

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# Answers to Written Questions

## Produce documents, reports and worksheets on a computer – D1.HGE.CL7.10 D1.HGA.CL6.07 D2.TGA.CL6.02

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. What are different software applications that can be used to prepare documents, reports or worksheets?

- Email and Internet browsers (Outlook)
- Word processing (Microsoft Word)
- Spreadsheets (Excel)
- Databases (Excel)
- Work project
- Accounting packages (MYOB)
- Presentation packages (PowerPoint)
- Manage files (Office Manager).

### 2. What are different technology (hardware) applications that can be used to prepare documents, reports or worksheets?

- Computers, including laptops
- Digital cameras
- Zip drives
- Modems
- Printer/scanner/photocopier combination
- Facsimile
- Paging equipment
- Calculators
- Audio-transcribing machine
- Telephone answering machines
- External hard drives
- Ergonomical mouse.

**3. What are different types of hospitality documents that are prepared?**

- Guest mail
- Customer records – internal files such as guest history, profile, accounts, folios, and internal charges documents
- Incoming and outgoing correspondence relating to the operation of the establishment
- Files Letters
- Facsimiles (faxes)
- Memos
- Reports
- Menus
- Banquet orders
- Financial records
- Invoices
- Receipts
- E-mail.

**4. Who are potential audiences that may receive documents?**

Potential audiences for the wide range of documents include:

- Customers, guests and those who attend parties, conferences and seminars
- Staff
- Suppliers
- Media
- Agencies
- Government bodies.

**5. When preparing documents, who may need to be involved in preparing or reviewing them before they are given to the intended audience?**

- Supervisor
- Originator of document
- Project leader
- Colleagues
- Intended client – as an initial draft.

**6. What are the three main writing styles used when preparing documents?**

- Writing to persuade
- Writing to develop an argument
- Writing to inform.

**7. What are three types of documents that can be produced?**

Answers will be varied.

**8. What are three steps to good writing?**

- Be clear about your purpose
- Plan what you will say
- Draft your document
- Edit
- Type the final draft
- Proof read.

**9. What are the essential parts to include when writing a letter?**

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

**10. What types of deadlines are there when preparing documents?**

- Immediately
- By a set date
- No hurry.

**11. What are some timing considerations when deciding deadlines?**

- Conduct necessary research to compile information
- Hold relevant meetings and discussions required
- Type the actual document
- Review and collect feedback
- Distribute or transport final document.

**12. What are different ways to store documents?**

- Storage in directories and sub-directories
- Storage on hard drive Storage on networked computers
- Storage of memory sticks
- Storage on CD-ROMs
- Storage on portable hard drives
- Appropriate storage/filing of hard copies.

**13. What are different types of software functions to be utilised when preparing documents?**

- Default settings
- Page setup
- Paragraph formatting
- Text formatting
- Tabs
- Line spacing
- Page numbering
- Headers and/or footers
- Application of spell check
- Indenting.

**14. What are the principles of proof reading?**

Proofread may relate to:

- Utilise spell check function of software
- Utilise grammar check function of software
- Check page break placement
- Check hard copy of document
- Check soft copy of document.

**15. What are the three methods that can be used to print from word?**

- File Menu option
- Printer icon
- Shortcut key - Ctrl-P.

**16. What do you check when proof reading?**

- Check the finished article
- Check the sequencing
- Check layout
- Check the attachments
- Check the mailing details
- Check the spelling and grammar
- Observe confidentiality.

**17. What types of modifications or activities may take place before printing final copies of a document?**

- Changing information within document
- Streamlining wording
- Change page size and orientation
- Change page margins
- Add/delete columns
- Formatting including alignment and line spacing, font size, indents, font colours, outside borders, bullets, numbering
- Copying, cutting and pasting
- Inserting page breaks and section breaks
- Inserting or changing headers and footers
- Inserting page numbers
- Adding styles
- Inserting and formatting tables
- Saving documents
- Inserting images and graphics/clip art
- Inserting smart art and shapes
- Check spelling and grammar
- Attaching documents
- Saving and naming documents
- Copying files/folders.

**18. What are various ways you can circulate documents to others for review and comment before sending final copies?**

The following are methods used to circulate documentation:

- Mail
- Email
- Fax
- By hand
- Courier
- As an accompaniment to an oral presentation.

**19. When preparing documents for sending, besides printing, what other activities may take place?**

- Producing multiple copies
- Collating documents
- Adding attachments – briefing papers, reports and other materials
- Binding
- Mailing
- Disseminating internally
- Recording dissemination in a file or book
- Filing – hard copy and computer based.

**20. Why should a name and signature be added to document?**

- Helps identify the author or the person who has authorised the document
- Easy reference if follow up is required.

## Observation Checklist

<b>Student name</b>	
<b>Assessor name</b>	
<b>Location/venue</b>	
<b>Unit of competency</b>	Produce documents, reports and worksheets on a computer D1.HGE.CL7.10 D1.HGA.CL6.07 D2.TGA.CL6.02
<b>Dates of observation</b>	
<b>Instructions</b>	<ol style="list-style-type: none"> <li>1. Over a period of time observe the student completing each of the following tasks:             <ol style="list-style-type: none"> <li>a) Determine presentation and format of document</li> <li>b) Produce document</li> <li>c) Print and deliver document</li> </ol> </li> <li>2. Enter the date on which the tasks were undertaken</li> <li>3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise</li> <li>4. Complete the feedback sections of the form, if required.</li> </ol>

<b>Did the candidate</b>	<b>Yes</b>	<b>No</b>
<b>Element 1: Determine presentation and format of document</b>		
Select software appropriate to the nature of the document to be produced	<input type="checkbox"/>	<input type="checkbox"/>
Select appropriate layout and style of document consistent with enterprise guidelines	<input type="checkbox"/>	<input type="checkbox"/>
Discuss format and presentation of document with appropriate person	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element 2: Produce document</b>		
Produce document in required style and format	<input type="checkbox"/>	<input type="checkbox"/>
Produce document within designated timelines	<input type="checkbox"/>	<input type="checkbox"/>
Save document regularly to avoid loss of data	<input type="checkbox"/>	<input type="checkbox"/>
Information from same or other software packages is integrated as required	<input type="checkbox"/>	<input type="checkbox"/>
Proof read draft document prior to printing	<input type="checkbox"/>	<input type="checkbox"/>

Did the candidate	Yes	No
<b>Element 3: Print and deliver document</b>		
Utilise printing function	<input type="checkbox"/>	<input type="checkbox"/>
Proofread document	<input type="checkbox"/>	<input type="checkbox"/>
Make any necessary modifications to document to improve appearance and meet required specification/s	<input type="checkbox"/>	<input type="checkbox"/>
Print and present documents according to requirements	<input type="checkbox"/>	<input type="checkbox"/>
<b>Did the student's overall performance meet the standard?</b>	<input type="checkbox"/>	<input type="checkbox"/>

**Feedback to student and trainer/assessor**

**Strengths:**

**Improvements needed:**

**General comments:**

<b>Candidate signature</b>		<b>Date</b>	
<b>Assessor signature</b>		<b>Date</b>	



## Third Party Statement

<b>Student name:</b>			
<b>Name of third party:</b>		<b>Contact no</b>	
<b>Relationship to student:</b>	<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>		
<b>Unit of competency:</b>	Produce documents, reports and worksheets on a computer D1.HGE.CL7.10 D1.HGA.CL6.07 D2.TGA.CL6.02		
<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>			
<b>Do you believe the trainee has demonstrated the following skills?</b> <i>(tick the correct response]</i>	<b>Yes</b>	<b>No</b>	<b>Not sure</b>
<b>Element 1: Determine presentation and format of document</b>			
Select software appropriate to the nature of the document to be produced	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Select appropriate layout and style of document consistent with enterprise guidelines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discuss format and presentation of document with appropriate person	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element 2: Produce document</b>			
Produce document in required style and format	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Produce document within designated timelines	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Save document regularly to avoid loss of data	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Information from same or other software packages is integrated as required	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Proof read draft document prior to printing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Do you believe the trainee has demonstrated the following skills? <i>(tick the correct response)</i>	Yes	No	Not sure
<b>Element 3: Print and deliver document</b>			
Utilise printing function	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Proofread document	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Make any necessary modifications to document to improve appearance and meet required specification/s	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Print and present documents according to requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Comments/feedback from Third Party to Trainer/Assessor:**

Large empty rectangular area for providing comments or feedback.

**Third party signature:**

**Date:**

**Send to:**



## Competency Recording Sheet

<b>Name of Student</b>		
<b>Name of Assessor/s</b>		
<b>Unit of Competency</b>	Produce documents, reports and worksheets on a computer	D1.HGE.CL7.10 D1.HGA.CL6.07 D2.TGA.CL6.02
<b>Date assessment commenced</b>		
<b>Date assessment finalised</b>		
<b>Assessment decision</b>	Pass Competent / Not Yet Competent (Circle one)	
<b>Follow up action required</b> (Insert additional work and assessment required to achieve competency)		
<b>Comments/observations by assessor/s</b>		

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
<b>Element 1: Determine presentation and format of document</b>						
Select software appropriate to the nature of the document to be produced						
Select appropriate layout and style of document consistent with enterprise guidelines						
Discuss format and presentation of document with appropriate person						
<b>Element 2: Produce document</b>						
Produce document in required style and format						
Produce document within designated timelines						
Save document regularly to avoid loss of data						
Information from same or other software packages is integrated as required						
Proof read draft document prior to printing						

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
<b>Element 3: Print and deliver document</b>						
Utilise printing function						
Proofread document						
Make any necessary modifications to document to improve appearance and meet required specification/s						
Print and present documents according to requirements						
<b>Candidate signature</b>			<b>Date</b>			
<b>Assessor signature</b>			<b>Date</b>			





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