

	Curriculum Document			
Curriculum Code	Curriculum Title		Logo	
334302001	Management Assistant			
	Name	Email	Phone	Logo
Development Quality Partner	Quality Council for Trades and Occupations (QCTO)	Peters.H@qcto.org.za	012 003 1800	

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6. 334302001-WM-06, Manage a paperless office, NQF Level 5, Credits 20	129
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SECTION 1: CURRICULUM SUMMARY

1. Occupational Information

1.1 Associated Occupation

334302: Personal Assistant

1.2 Occupation or Specialisation Addressed by this Curriculum

334302001: Management Assistant

1.3 Alternative Titles used by Industry

- Administrative Secretary
- Correspondence Assistant
- Executive Assistant
- Private Secretary
- Administrative assistant
- Office Support Worker

2. Curriculum Information

2.1 Curriculum Structure

This qualification is made up of the following compulsory Knowledge and Practical Skill Modules:

Knowledge Modules:

- 334302001-KM-01, Document management and record-keeping , NQF Level 5, Credits 15
- 334302001-KM-02, Computerised Information Processing, NQF Level 5, Credits 25
- 334302001-KM-03, Resource and procurement management, NQF Level 5, Credits 5
- 334302001-KM-04, Social media and digital literacy, NQF Level 4, Credits 5
- 334302001-KM-05, Office protocol, deportment and etiquette, NQF Level 4, Credits 10
- 334302001-KM-06, Business communication and customer services, NQF Level 5, Credits 8
- 334302001-KM-07, Ready for work standards, NQF Level 4, Credits 5
- 334302001-KM-08, Basic business calculations, NQF Level 4, Credits 5
- 334302001-KM-09, Apply End User Computing, NQF Level 3, Credits 6
- 334302001-KM-10, Business documentation and design, NQF Level 4, Credits 10
- 334302001-KM-11, Meeting administration, NQF Level 4, Credits 10
- 334302001-KM-12, Introductory project management, NQF Level 4, Credits 2

Total number of credits for Knowledge Modules: 106

Practical Skill Modules:

- 334302001-PM-01, Create a trip itinerary, NQF Level 5, Credits 15
- 334302001-PM-02, Address protocol requirements , NQF Level 5, Credits 5
- 334302001-PM-03, Determine, acquire and allocate resources for the secretarial unit , NQF Level 5, Credits 10
- 334302001-PM-04, Design and develop complex text documents, NQF Level 5, Credits 5
- 334302001-PM-05, Manage a small project , NQF Level 5, Credits 10
- 334302001-PM-06, Support the recruitment, selection and induction of staff, NQF Level 5, Credits 10
- 334302001-PM-07, Apply communication and effective customer relationships , NQF Level 5, Credits 10
- 334302001-PM-08, Organise meetings, NQF Level 5, Credits 10

Total number of credits for Practical Skill Modules: 75

This qualification also requires the following Work Experience Modules:

- 334302001-WM-01, Perform administrative and meeting support functions to support management, NQF Level 5, Credits 12
- 334302001-WM-02, Apply ready for work standards to everyday work activities, NQF Level 5, Credits 25
- 334302001-WM-03, Handle customer and client's queries and liaison in an office, NQF Level 5, Credits 8
- 334302001-WM-04, Assist in planning and coordinating at least two special events/conferences, NQF Level 5, Credits 20
- 334302001-WM-05, Procure and allocate resources, NQF Level 5, Credits 15
- 334302001-WM-06, Manage a paperless office, NQF Level 5, Credits 20
- 334302001-WM-07, Apply supervisory skills to coordinate and direct clerical staff activities, NQF Level 5, Credits 20
- 334302001-WM-08, Prepare a trip itinerary, NQF Level 4, Credits 15

Total number of credits for Work Experience Modules: 135

2.2 Entry Requirements

NQF Level 4 with Communication

3. Assessment Quality Partner Information

Name of body: Quality Council for Trades and Occupations (QCTO)

Address of body: 256 Glyn Street, Hatfield, Pretoria, 0083

Contact person name: B Langa

Contact person work telephone number: 012 003 1800

4. Part Qualification Curriculum Structure

None

SECTION 2: OCCUPATIONAL PROFILE

1. Occupational Purpose

The purpose of this qualification is to prepare a learner to operate as a Management Assistant.

The qualification provides an opportunity for the learner to acquire a range of skills to be able to coordinate the activities of the organisation and provide professional administrative and secretarial support to managers, either as part of a team or individually. They also coordinate activities of assigned personnel and provide current and updated relevant information to the manager as support for upcoming meetings.

The Management assistant can also function as a Senior or Executive secretary, depending on experience and is the gatekeeper who promotes the professional image of the manager and the organisation. The management assistant also needs to be able to manage special projects using resources given according to good governance procedures.

The qualified learner will be actively engaged in becoming a well-rounded, multi-skilled person, prepared for further, more specific study and a number of alternative career choices within the secretarial or personal assistant field.

A qualified learner will be able to:

- Plan, organise and support department meetings and workshops
- Apply appropriate personal and interpersonal skills to a range of situations to facilitate the smooth relations between internal and external stakeholders according to organisational standards
- Apply basic knowledge of relevant administration governance, policies and procedures to manage resources effectively in the organisation.
- Plan, administer and provide support services to a special project within an organisation
- Promote professional documentation by utilising effective and accurate information processing and research skills to enhance the professional image of the organisation or industry

2. Occupational Tasks

- Plan, organise and support department meetings and workshops (NQF Level 5)
- Apply appropriate personal and interpersonal skills to a range of situations to facilitate the smooth relations between internal and external stakeholders according to organisational standards (NQF Level 5)
- Apply basic knowledge of relevant administration governance, policies and procedures to manage resources effectively in the organisation (NQF Level 5)
- Plan, administer and provide support services to a special project within an organisation (NQF Level 5)
- Promote professional documentation by utilising effective and accurate information processing and research skills to enhance the professional image of the organisation or industry (NQF Level 5)

3. Occupational Task Details

3.1. Plan, organize and support department meetings and workshops (NQF Level 5)

Unique Product or Service:

Agenda

Occupational Responsibilities:

- Prepare checklists for meeting arrangements to ensure that all aspects of meeting are taken care of
- Send out invitations, follow-up and confirm attendance of meeting as well as dietary requirements
- Note apologies
- Book appropriate meeting venue with necessary audio-visual equipment

Occupational Contexts:

- Secretarial support to: Government, Corporates, Entrepreneurs, SMMEs, Institutions of Learning, NGO's, International NGO's, State Owned Enterprises

3.2. Apply appropriate personal and interpersonal skills to a range of situations to facilitate the smooth relations between internal and external stakeholders according to organisational standards (NQF Level 5)

Unique Product or Service:

Emotional intelligence

Occupational Responsibilities:

- Handle situations and people with tact, poise and discretion
- Change your outlook towards stakeholders by portraying a positive office image
- Motivate subordinates to achieve operational objectives
- Build peer synergy to overcome intimidation in the workplace

Occupational Contexts:

- Within an office environment, unit or department

3.3. Apply basic knowledge of relevant administration governance, policies and procedures to manage resources effectively in the organisation (NQF Level 5)

Unique Product or Service:

Basic Conditions of Employment Act

Occupational Responsibilities:

- Have a basic understanding of and be conversant with relevant policies and procedures in the office environment
- Apply the organisational policies and procedures in relation to resource management
- Manage petty cash system
- Be able to implement organizational policies regarding social media
- Answer moderately complex questions and seek information regarding policies

Occupational Contexts:

- Various departments such as Human Resources, Finance, Marketing and Public Relations

3.4. Plan, administer and provide support services to a special project within an organisation (NQF Level 5)**Unique Product or Service:**

Project plan

Occupational Responsibilities:

- Perform management functions related to the project and documentation requirements and administer project meetings and workshops according to developed project plan and schedules
- Develop and update project plans according to timeframes and company procedures
- Identify and acquire the resources required for project implementation according to company policies
- Identify and apply best practice relevant to operational responsibilities in terms of monitoring and evaluation (latest tools and technology relevant to project management)

Occupational Contexts:

- Various departments within and outside of the company

3.5. Promote professional documentation by utilising effective and accurate information processing and research skills to enhance the professional image of the organisation or industry (NQF Level 5)**Unique Product or Service:**

E-filing

Occupational Responsibilities:

- Produce office documentation
- Proofread and format incoming and outgoing documentation
- Create display documents for public information purposes
- Read trade publications, attend seminars and consult with other meetings and events professional to keep abreast of meeting and events standards and trends

Occupational Contexts:

- Various departments within and outside of the company

SECTION 3: CURRICULUM COMPONENT SPECIFICATIONS

SECTION 3A: KNOWLEDGE MODULE SPECIFICATIONS

List of Knowledge Modules for which Specifications are included

- 334302001-KM-01, Document management and record-keeping , NQF Level 5, Credits 15
- 334302001-KM-02, Computerised Information Processing, NQF Level 5, Credits 25
- 334302001-KM-03, Resource and procurement management, NQF Level 5, Credits 5
- 334302001-KM-04, Social media and digital literacy, NQF Level 4, Credits 5
- 334302001-KM-05, Office protocol, deportment and etiquette, NQF Level 4, Credits 10
- 334302001-KM-06, Business communication and customer services, NQF Level 5, Credits 8
- 334302001-KM-07, Ready for work standards, NQF Level 4, Credits 5
- 334302001-KM-08, Basic business calculations, NQF Level 4, Credits 5
- 334302001-KM-09, Apply End User Computing, NQF Level 3, Credits 6
- 334302001-KM-10, Business documentation and design, NQF Level 4, Credits 10
- 334302001-KM-11, Meeting administration, NQF Level 4, Credits 10
- 334302001-KM-12, Introductory project management, NQF Level 4, Credits 2

1. 334302001-KM-01, Document management and record-keeping, NQF Level 5, Credits 15

1.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of the outline process for document management and record keeping in accordance with organisational policy and procedures and other related legislative and business system requirements. This procedure describes: document origination, document review and update of documents (where necessary), the identification of documents to ensure the most current versions are legible and available at points of use. This also includes the creation, administering and maintaining of filing systems and document storage, archiving and eventual disposal.

The learning will enable learners to demonstrate an understanding of:

- KM-01-KT01: Origination of documents (10%)
- KM-01-KT02: Creation of a filing system (15%)
- KM-01-KT03: Distribution of documents (15%)
- KM-01-KT04: Filing categories (15%)
- KM-01-KT05: Storage of documentation (15%)
- KM-01-KT06: Archiving of documents (15%)
- KM-01-KT07: Disposal of out-dated documentation (15%)

1.2 Guidelines for Topics

1.2.1. KM-01-KT01: Origination of documents (10%)

Topic elements to be covered include:

- KT0101 Types of document origination
- KT0102 Identify reasons why documents originate
- KT0103 Relevant legislative requirements of document origination

Internal Assessment Criteria and Weight

- IAC0101 Identify types of documents appropriate for a filing system
- IAC0102 Describe types of document origination for a filing system (Range: This includes but is not limited to the following: verbal instruction, audio instruction and written instruction)
- IAC0103 Discuss the purpose of document origination (Range: This includes but is not limited to the following: legislation, policy and procedures, process review, process feedback, research, response to enquiry, communication purposes, internal and external reporting, internal and external contracting, information and instructions)
- IAC0104 Analyse the legislative requirements of document for a specific industry (Range: This includes but is not limited to the following: The Constitution, Basic Conditions of Employment Act, Labour Relations Act, Protection of Personal Information Act, Administrative Justice Act, Access to Information Act, Occupational Health and Safety Act)

(Weight 10%)

1.2.2. KM-01-KT02: Creation of a filing system (15%)

Topic elements to be covered include:

- KT0201 Basic filing procedure
- KT0202 Filing systems and equipment
- KT0203 Requirements of a good filing system
- KT0204 Role of a filing clerk

Internal Assessment Criteria and Weight

- IAC0201 Identify the components of a filing plan. (Range: This includes but is not limited to the following: custodians, assign and delegate authority and responsibility)
- IAC0202 Categorise appropriate documents for a filing system (Range: This includes but is not limited to the following: transactional documents, policies, procedures, contracts, general internal business documentation, correspondence)
- IAC0203 Explain the factors that determine the filing capacity of an organisation (Range: This includes but is not limited to the following: security, space, financial resources, human resources training and staff capacity building)
- IAC0204 Identify equipment needed for filing systems
- IAC0205 Describe and identify the purpose of different filing systems appropriate for a specific organisation (Range: This includes but is not limited to the following: Electronic and manual)
- IAC0206 List and compare the advantages and disadvantages of different filing systems (Range: This includes but is not limited to the following: electronic and manual)
- IAC0207 Analyse the organisational security requirements for a filing system (Range: This includes but is not limited to the following: when do we file, what do we file, how do we control organisational information)

(Weight 15%)

1.2.3. KM-01-KT03: Distribution of documents (15%)

Topic elements to be covered include:

- KT0301 Manual and electronic filing procedures
- KT0302 Components of filing registers
- KT0303 Methods of sorting documents
- KT0304 Different record keeping system (Range: including but not limited to records inventory)
- KT0305 Document distribution methods
- KT0306 Difference between internal and external distribution methods
- KT0307 Process of coding and access to documents
- KT0308 The importance of document authentication

- KT0309 Distribution in terms of legislation and level of access (Range: includes but is not limited to security, access to information, confidentiality)

Internal Assessment Criteria and Weight

- IAC0301 Explain different filing procedures (Range: This includes but is not limited to the following: receiving documents, action, follow-up, collecting documents to be filed, maintaining the filing system, processing records for filing, returning records to the file)
- IAC0302 Identify the components of a file register (Range: This includes but is not limited to the following: document and file properties, author, dates, file status, file security, persons responsible)
- IAC0303 Differentiate between centralized and decentralized filing systems
- IAC0304 Identify and explain the advantages and disadvantages of different file sorting methods (Range: This includes but is not limited to the following: alphabetical, numerical, subject, chronological and geographical)
- IAC0305 Define the concept of records inventory
- IAC0306 Identify the components of a record keeping system
- IAC0307 Discuss best practice document distribution methods
- IAC0308 Explain the importance of document tracking
- IAC0309 Differentiate between internal and external distribution methods used by organisations (Range: This includes but is not limited to the following: post, messenger, courier, e-mail, fax, webpage, news media)
- IAC0310 Identify and compare different coding methods used for document distribution and filing (Range: this includes but not limited to: alphabetic, numeric, alphanumeric, thematic, project, geographic, chronological)
- IAC0311 Explain document access control (Range: This includes but not limited to: forms, authorisations, personal pin codes, classification, system access codes)
- IAC0312 Identify key legislation relevant to access, confidentiality and security of information when documents are distributed
- IAC0313 Discuss the importance of document authentication for filing purposes (Range includes but not limited to: Certification, watermarks, stamps, seals, signatures, internal security requirements)
- IAC0314 Explain security measures used in originations to ensure the protection of private and confidential information

(Weight 15%)

1.2.4. KM-01-KT04: Filing categories (15%)

Topic elements to be covered include:

- KT0401 The process of forming filing categories
- KT0402 Filing keys and indexes
- KT0403 Correspond with different internal and external stakeholders

- KT0404 Discuss the arrangement and labelling of files

Internal Assessment Criteria and Weight

- IAC0401 List and explain different types of filing categories (Range: This includes but not limited to: alphabetic, numeric, alphanumeric, thematic, project, geographic, chronological)
- IAC0402 Analyse the steps involved in the creation of filing categories
- IAC0403 Describe different types of file indexes used in filing categories
- IAC0404 Discuss the process of creating filing keys and filing indexes
- IAC0405 Distinguish between internal and external correspondence with stakeholders regarding document management and record keeping (Range: This includes but not limited to: contracts, reports, memos, policies)
- IAC0406 Discuss the importance of file labelling
- IAC0407 Describe the different ways in which files can be arranged
- IAC0408 Identify the labelling systems that can be used by organisations for a filing system

(Weight 15%)

1.2.5. KM-01-KT05: Storage of documentation (15%)

Topic elements to be covered include:

- KT0501 Onsite and/or offsite storage systems
- KT0502 Storage legislation requirements
- KT0503 Types of storage and their requirements
- KT0504 Need for storage security

Internal Assessment Criteria and Weight

- IAC0501 Understand the legislative requirements for document storage (Range: This includes but not limited to: short-term, medium and long term storage)
- IAC0502 Compare different storage systems for organisational requirements (Range: This includes but not limited to: onsite/offsite and electronic/manual)
- IAC0503 Discuss different types of storage available (Range: This includes but not limited to: cost, space, accessibility, security, location, ease of retrieval, health and safety recommendations)
- IAC0504 Analyse risk involved with types of storage (Range: This includes but not limited to: offsite/onsite; manual/electronic)
- IAC0505 Outline the storage process and procedure of an organisation

(Weight 15%)

1.2.6. KM-01-KT06: Archiving of documents (15%)

Topic elements to be covered include:

- KT0601 Understand archiving policy and procedures
- KT0602 Methods of archiving
- KT0603 Understand the importance of record maintenance and security

Internal Assessment Criteria and Weight

- IAC0601 State the archiving process of an organisation as outlined in policies and procedures
- IAC0602 Discuss the advantages and disadvantages of different archiving methods (Range: This includes but not limited to: electronic and/or manual)
- IAC0603 Explain the status of documents (Range: This includes but not limited to: active, semi-active and inactive records)
- IAC0604 Identify security requirements for archived documents

(Weight 15%)

1.2.7. KM-01-KT07: Disposal of out-dated documentation (15%)

Topic elements to be covered include:

- KT0701 Understand national and/or international legislative prescriptions for the disposal of official documents
- KT0702 Identify methods of disposal
- KT0703 Outline organisational procedures for document disposal
- KT0704 Identify the security measure for document disposal

Internal Assessment Criteria and Weight

- IAC0701 Analyse the legislative prescriptions for the disposal of different categories of documents
- IAC0702 Outline the organisational processes and procedures for the disposal of documents
- IAC0703 Identify secure methods for the disposal of various documents
- IAC0704 Compare document disposal best practices within industry (Range: This includes but not limited to: tracking of documents, review disposal dates, basic knowledge sharing practices)
- IAC0705 Describe the equipment used for the disposal of documents (Range: This includes but not limited to: incinerators, shredders)

(Weight 15%)

1.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Learning resources approved by the Assessment Quality Partner (AQP)
- Assessment documentation, instruments and standards approved by the AQP
- Equipped learning facilitation venue, meeting health and safety standards
- Access for people with disabilities
- Has Access to:
 - Structured examples and scenarios
 - Internet facilities, required literature and research facilities
 - Distance and E-learning

Human Resource Requirements:

- Lecturer/learner ratio of 1:30 (Max)
- Lecturers/facilitators need to be qualified at a Level 6 or higher in the relevant field or have at least 3 years relevant experience in Office Management
- It would be advantageous if lecturers are registered with a relevant Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

1.4 Exemptions

None

2. 334302001-KM-02, Computerised Information Processing, NQF Level 5, Credits 25

2.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of how to create, design and produce organisational documents using complex technical features. The learning will enable learners to demonstrate an understanding of and to manage to ensure consistent standards of document design within an organisation are met.

The learning will enable learners to demonstrate an understanding of:

- KM-02-KT01: Concise communication documents (10%)
- KM-02-KT02: Meeting documents (10%)
- KM-02-KT03: Display documents (10%)
- KM-02-KT04: Function documents (10%)
- KM-02-KT05: Presentation documents (10%)
- KM-02-KT06: Marketing documentation (10%)
- KM-02-KT07: Report documents (10%)
- KM-02-KT08: Financial documents (10%)
- KM-02-KT09: Research document (10%)
- KM-02-KT10: Formatting large documents (10%)

2.2 Guidelines for Topics

2.2.1. KM-02-KT01: Concise communication documents (10%)

Topic elements to be covered include:

- KT0101 Telephone message form
- KT0102 Fax form
- KT0103 Memo
- KT0104 Business Letters
- KT0105 Circulars/Letters of promotions

Internal Assessment Criteria and Weight

- IAC0101 Match document requirements with software functions to provide efficient production of documents
- IAC0102 Identify the organisational needs, requirements and information technology capabilities relevant to the design and production of documents
- IAC0103 Establish documentation standards to meet organisational requirements
- IAC0104 Design, test and amend document templates
- IAC0105 Develop and implement documentation

(Weight 10%)

2.2.2. KM-02-KT02: Meeting documents (10%)

Topic elements to be covered include:

- KT0201 Notices of meetings
- KT0202 Agendas
- KT0203 Minutes

Internal Assessment Criteria and Weight

- IAC0101 Match document requirements with software functions to provide efficient production of documents
- IAC0102 Identify the organisational needs, requirements and information technology capabilities relevant to the design and production of documents
- IAC0103 Establish documentation standards to meet organisational requirements
- IAC0104 Design, test and amend document templates
- IAC0105 Develop and implement documentation

(Weight 10%)

2.2.3. KM-02-KT03: Display documents (10%)

Topic elements to be covered include:

- KT0301 Advertisements
- KT0302 Pamphlets
- KT0303 Brochures
- KT0304 Folded documents on portrait and landscape

Internal Assessment Criteria and Weight

- IAC0101 Match document requirements with software functions to provide efficient production of documents
- IAC0102 Identify the organisational needs, requirements and information technology capabilities relevant to the design and production of documents
- IAC0103 Establish documentation standards to meet organisational requirements
- IAC0104 Design, test and amend document templates
- IAC0105 Develop and implement documentation

(Weight 10%)

2.2.4. KM-02-KT04: Function documents (10%)

Topic elements to be covered include:

- KT0401 Programs
- KT0402 Schedules
- KT0403 Itineraries
- KT0404 Invitations

Internal Assessment Criteria and Weight

- IAC0101 Match document requirements with software functions to provide efficient production of documents
- IAC0102 Identify the organisational needs, requirements and information technology capabilities relevant to the design and production of documents
- IAC0103 Establish documentation standards to meet organisational requirements
- IAC0104 Design, test and amend document templates
- IAC0105 Develop and implement documentation

(Weight 10%)

2.2.5. KM-02-KT05: Presentation documents (10%)

Topic elements to be covered include:

- KT0501 Speeches
- KT0502 Lectures
- KT0503 Presentations

Internal Assessment Criteria and Weight

- IAC0101 Match document requirements with software functions to provide efficient production of documents
- IAC0102 Identify the organisational needs, requirements and information technology capabilities relevant to the design and production of documents
- IAC0103 Establish documentation standards to meet organisational requirements
- IAC0104 Design, test and amend document templates
- IAC0105 Develop and implement documentation

(Weight 10%)

2.2.6. KM-02-KT06: Marketing documentation (10%)

Topic elements to be covered include:

- KT0601 Business Cards

- KT0602 Letterheads
- KT0603 Organisation hierarchy
- KT0604 Policies and procedures
- KT0605 Contracts
- KT0606 Appeals

Internal Assessment Criteria and Weight

- IAC0101 Match document requirements with software functions to provide efficient production of documents
- IAC0102 Identify the organisational needs, requirements and information technology capabilities relevant to the design and production of documents
- IAC0103 Establish documentation standards to meet organisational requirements
- IAC0104 Design, test and amend document templates
- IAC0105 Develop and implement documentation

(Weight 10%)

2.2.7. KM-02-KT07: Report documents (10%)

Topic elements to be covered include:

- KT0701 Informal reports
- KT0702 Formal reports

Internal Assessment Criteria and Weight

- IAC0101 Match document requirements with software functions to provide efficient production of documents
- IAC0102 Identify the organisational needs, requirements and information technology capabilities relevant to the design and production of documents
- IAC0103 Establish documentation standards to meet organisational requirements
- IAC0104 Design, test and amend document templates
- IAC0105 Develop and implement documentation

(Weight 10%)

2.2.8. KM-02-KT08: Financial documents (10%)

Topic elements to be covered include:

- KT0801 Financial spreadsheets
- KT0802 Purchase order

- KT0803 Invoice
- KT0804 Quotation

Internal Assessment Criteria and Weight

- IAC0101 Match document requirements with software functions to provide efficient production of documents
- IAC0102 Identify the organisational needs, requirements and information technology capabilities relevant to the design and production of documents
- IAC0103 Establish documentation standards to meet organisational requirements
- IAC0104 Design, test and amend document templates
- IAC0105 Develop and implement documentation

(Weight 10%)

2.2.9. KM-02-KT09: Research document (10%)

Topic elements to be covered include:

- KT0901 Questionnaire
- KT0902 Checklist
- KT0903 Survey

Internal Assessment Criteria and Weight

- IAC0101 Match document requirements with software functions to provide efficient production of documents
- IAC0102 Identify the organisational needs, requirements and information technology capabilities relevant to the design and production of documents
- IAC0103 Establish documentation standards to meet organisational requirements
- IAC0104 Design, test and amend document templates
- IAC0105 Develop and implement documentation

(Weight 10%)

2.2.10. KM-02-KT10: Formatting large documents (10%)

Topic elements to be covered include:

- KT1001 Formatting content
- KT1002 Multi-level numbering
- KT1003 Styles
- KT1004 Biography
- KT1005 Indexes

Internal Assessment Criteria and Weight

- IAC0101 Match document requirements with software functions to provide efficient production of documents
- IAC0102 Identify the organisational needs, requirements and information technology capabilities relevant to the design and production of documents
- IAC0103 Establish documentation standards to meet organisational requirements
- IAC0104 Design, test and amend document templates
- IAC0105 Develop and implement documentation

(Weight 10%)

2.3 Provider Programme Accreditation Criteria

Physical Requirements:

- The provider must have lesson plans and structured learning material or provide learners with access to structured learning material that addresses all the topics in all the knowledge modules.
- In addition the following must be provided:
 - A computer with the necessary software per student in class
 - Printers
 - Access to internet facilities
 - Distance and e-learning modalities available to learners

Human Resource Requirements:

- Lecturer/learner ratio of 1:30 (Max)
- Lecturers/facilitators need to be qualified at a Level 6 or higher in the relevant field or have at least 3 years relevant experience in Computerised Information Processing
- It would be advantageous if lecturers are registered with a relevant Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

2.4 Exemptions

- None

3. 334302001-KM-03, Resource and procurement management, NQF Level 5, Credits 5

3.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of how to obtain or procure goods and services efficiently and effectively and allocate the units resources when and where they are needed. The process includes preparation and processing of a requisitions, submission documents and quotations of suppliers on the database according to specifications given in the request.

The learning will enable learners to demonstrate an understanding of:

- KM-03-KT01: Principles of financial and supply chain management (20%)
- KM-03-KT02: Budgeting and expenditure (20%)
- KM-03-KT03: Procurement (20%)
- KM-03-KT04: Asset management and stocktaking (20%)
- KM-03-KT05: Disposal management (20%)

3.2 Guidelines for Topics

3.2.1. KM-03-KT01: Principles of financial and supply chain management (20%)

Topic elements to be covered include:

- KT0101 Legislation applicable to finance and supply chain management
- KT0102 Financial policies and procedures of the organisation
- KT0103 Financial and supply chain responsibilities of role players
- KT0104 Financial management cycle (Range, but not limited to: planning and budgeting, resources allocation, monitoring, evaluation and reporting)
- KT0105 Elements of supply chain management
- KT0106 Ethical principles related to supply chain management
- KT0107 Customer order fulfilment process

Internal Assessment Criteria and Weight

- IAC0101 Identify and explain basic financial and supply chain concepts
- IAC0102 Principles and legislative provisions of Finance and Supply Chain Management in the public service are explained
- IAC0103 Mention the procedures of financial formation of an organisation
- IAC0104 Define, list and explain the step involve in financial management cycle
- IAC0105 Name and explain the element of supply chain management
- IAC0106 Explain the ethical principle in supply chain management
- IAC0107 Analyse steps involved in customer order fulfilment process

(Weight 20%)

3.2.2. KM-03-KT02: Budgeting and expenditure (20%)

Topic elements to be covered include:

- KT0201 Elements and principles of budgeting and expenditure (Range; This includes but is not limited to the following: line items, income, expenditure, quotations, variances, balance)
- KT0202 Linking the need to the budget and expenditure
- KT0203 Principles in compiling specifications and terms of references
- KT0204 Components of a budget
- KT0205 Monitoring of budget

Internal Assessment Criteria and Weight

- IAC0201 Explain the difference between budget and expenditure
- IAC0202 Explain: unauthorised, irregular and fruitless and wasteful expenditure
- IAC0203 Explain the difference between a specification and terms of reference
- IAC0204 Discuss components of a budget
- IAC0205 List methods used to monitor a budget

(Weight 20%)

3.2.3. KM-03-KT03: Procurement (20%)

Topic elements to be covered include:

- KT0301 Plan for the event to understand procurement elements
- KT0302 Procurement requisition process
- KT0303 Utilise the standards and specifications according to company policy
- KT0304 Supplier research and selection
- KT0305 Compare against given criteria
- KT0306 Make submission for financing
- KT0307 Procure against given criteria
- KT0308 Procedure for receipt and inspection of goods
- KT0309 Administration of services required

Internal Assessment Criteria and Weight

- IAC0301 Understand procurement procedures
- IAC0302 Explain the procurement requisition process according to company process and procedures

- IAC0303 Explain the importance of sourcing various suppliers for the same service
- IAC0304 Discuss how the criteria influences the sourcing of suppliers
- IAC0305 Explain a purchase order
- IAC0306 Explain the procedure for receipt and inspection of goods

(Weight 20%)

3.2.4. KM-03-KT04: Asset management and stocktaking (20%)

Topic elements to be covered include:

- KT0401 Definition of assets
- KT0402 Classification of assets
- KT0403 Asset verification
- KT0404 Recording and maintaining of assets in an asset register
- KT0405 Safekeeping of assets
- KT0406 Asset administration and control in Supply Chain Management
- KT0407 Principles of stocktaking
- KT0408 Methods of asset depreciation
- KT0409 Asset performance and maintenance processes

Internal Assessment Criteria and Weight

- IAC0401 Define an asset
- IAC0402 Distinguish between tangible and intangible assets
- IAC0403 Discuss the importance of asset verification
- IAC0404 Explain how assets are recorded and maintained using an asset register
- IAC0405 Discuss the importance of asset safekeeping
- IAC0406 Apply Supply Chain Management control procedures for administering assets for compliance
- IAC0407 List and explain the principles of stocktaking
- IAC0408 List and discuss methods of asset depreciation
- IAC0409 Analyse asset performance and maintenance processes to enhance performance of the unit

(Weight 20%)

3.2.5. KM-03-KT05: Disposal management (20%)

Topic elements to be covered include:

- KT0501 Disposal management definitions and legislations
- KT0502 Methods of disposal
- KT0503 Disposal of records
- KT0504 Disposal of assets
- KT0505 Recycling assets
- KT0506 Tracking assets

Internal Assessment Criteria and Weight

- IAC0501 Explain when assets should be disposed off
- IAC0502 Describe the elements that should be covered in an organisation disposal policy
- IAC0503 Provide a clear distinction between the disposal of assets and records
- IAC0504 Discuss way and means of disposing of records in an organisation
- IAC0505 Discuss possible risks in relation to disposal of confidential information
- IAC0506 Compare different methods of disposing of confidential information
- IAC0507 Discuss the importance of recycling assets and greening principles
- IAC0508 Outline the process of tracking the disposal of assets

(Weight 20%)

3.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Learning resources approved by the AQP
- Assessment documentation, instruments and standards approved by the AQP
- Equipped learning facilitation venue, meeting health and safety standards
- Access for people with disabilities
- Has Access to:
 - Structured examples and scenarios
 - Internet facilities, required literature and research facilities
 - Distance and E-learning

Human Resource Requirements:

- Lecturer/learner ratio of 1:30 (Max)

- Lecturers/facilitators need to be qualified at a Level 6 or higher in the relevant field or have at least 5 years relevant experience in resource and procurement management
- It would be advantageous if lecturers are registered with a relevant Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

3.4 Exemptions

- None

4. 334302001-KM-04, Social media and digital literacy, NQF Level 4, Credits 5

4.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of how to access, scan and evaluate the multilingual and multi-literacy online environments to utilize digital technology to facilitate sharing and networking with internal and external stakeholders. The learner will gain the necessary skills to understand the impact of social media and etiquette when utilizing the tools to enhance the image and the business of the organisation.

The learning will enable learners to demonstrate an understanding of:

- KM-04-KT01: Introduction to the different social media and digital literature platforms (50%)
- KM-04-KT02: Social media as a communication tool (50%)

4.2 Guidelines for Topics

4.2.1. KM-04-KT01: Introduction to the different social media and digital literature platforms (50%)

Topic elements to be covered include:

- KT0101 Definition and explanation of social media
- KT0102 Different types of social media: (Range: includes but is not limited to: Facebook, Twitter, LinkedIn, Google, YouTube, Tumblr, Instagram, Pinterest, and Flickr)
- KT0103 Advantages and disadvantages of each type of social media
- KT0104 Potential risk factors of using social media
- KT0105 Social media advertising

Internal Assessment Criteria and Weight

- IAC0101 Define social media
- IAC0102 Different types of social media are identified: (Range: Includes but is not limited to, blogs, forums, Facebook, Twitter, LinkedIn, Google, YouTube, Tumblr, Instagram, Pinterest, and Flickr)
- IAC0103 Discuss the advantages and disadvantages of each platform
- IAC0104 Discuss potential risk factors of using social media in a business
- IAC0105 Explain and define social media advertising

(Weight 50%)

4.2.2. KM-04-KT02: Social media as a communication tool (50%)

Topic elements to be covered include:

- KT0201 Understand how social media has created a shift in communications
- KT0202 Understand the current state of social media marketing
- KT0203 Basic social media etiquette

- KT0204 Factors to consider when identifying social media tools to be used in an organisation
- KT0205 The impact of social media on service delivery in an organisation
- KT0206 The consequences of using social media tools in the business

Internal Assessment Criteria and Weight

- IAC0201 Explain in detail how social media has created a shift in communication
- IAC0202 Discuss what the current state of social media is in marketing
- IAC0203 Discuss the impact of social media on service delivery in an organisation
- IAC0204 Discuss the factors to consider when identifying social media tools to be used in an organisation
- IAC0205 Differentiate between the various platforms to ensure that information obtained is reliable, valid and complete and explain how to utilize in a communication campaign
- IAC0206 Explain how social media can have an impact on service delivery in an organisation

(Weight 50%)

4.3 Provider Programme Accreditation Criteria

Physical Requirements:

- The provider must have lesson plans and structured learning material or provide learners with access to structured learning material that addresses all the topics in all the knowledge modules
- A computer with the necessary software
- Access to internet facilities
- Distance and e-learning modalities available to learners for knowledge components

Human Resource Requirements:

- Lecturer/learner ratio of 1:30 (Max)
- Lecturers or facilitators need to be qualified at a Level 5 in Social Media and digital literacy and communication or Marketing and public relations environment and have at least 2 years facilitation experience.
- Facilitators should be a registered Assessor and have professional recognition in the field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Licencing requirements of operating systems used
- Approved and accredited by the relevant AQP as per QCTO requirements

4.4 Exemptions

- None

5. 334302001-KM-05, Office protocol, deportment and etiquette, NQF Level 4, Credits 10

5.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of international protocol requirements; develop an appreciation for professional etiquette and diplomacy; cultural diversity, multicultural communication and understand the principles of a professional image and grooming to promote the image of the organisation.

The learning will enable learners to demonstrate an understanding of:

- KM-05-KT01: International protocol (25%)
- KM-05-KT02: Cultural diversity (25%)
- KM-05-KT03: Multi-cultural communication (25%)
- KM-05-KT04: Grooming and deportment (25%)

5.2 Guidelines for Topics

5.2.1. KM-05-KT01: International protocol (25%)

Topic elements to be covered include:

- KT0101 Demonstrate awareness of international protocol principles in relation to forms of address and introductions
- KT0102 Explain protocol principles at various functions
- KT0103 Research professional etiquette in appropriate contexts

Internal Assessment Criteria and Weight

- IAC0101 Understand the different forms of address and introductions
- IAC0102 Explain the official order of precedence in a specific target country
- IAC0103 Understand the incoming and outgoing application of protocols for state visits
- IAC0104 Research protocols regarding ceremonial functions and gifts
- IAC0105 Explain the appropriate etiquette to specific situations
- IAC0106 Investigate specific etiquette rules of a selected country

(Weight 25%)

5.2.2. KM-05-KT02: Cultural diversity (25%)

Topic elements to be covered include:

- KT0201 The role of cultural diversity in a multicultural workplace, both externally and internally
- KT0202 Basic behavioural styles, benefits and challenges of cultural diversity
- KT0203 Required tools for managing cultural diversity internally and externally in the workplace
- KT0204 Ways of ensuring that culture does not interfere with the business of an organisation

- KT0205 Understanding of global time difference

Internal Assessment Criteria and Weight

- IAC0201 Explain the role that cultural diversity plays in a multicultural workplace, both internally and externally
- IAC0202 Identify and explain basic behavioural styles of cultural diversity
- IAC0203 Outline the benefits and challenges of cultural diversity
- IAC0204 Discuss the required tools for dealing with cultural diversity in the workplace
- IAC0205 Explain ways of ensuring that culture does not interfere with the business of an organisation
- IAC0206 Calculate the time difference using modern technologies

(Weight 25%)

5.2.3. KM-05-KT03: Multi-cultural communication (25%)

Topic elements to be covered include:

- KT0301 Greetings and replies
- KT0302 Use the SOFTEN approach: Smile, Open gestures, Flexible, Trust, Eye Contact, and Nod
- KT0303 Types of non-verbal communication that differs from culture to culture
- KT0304 Challenges of cross-cultural communication
- KT0305 Troubleshoot to remedy possible language barriers

Internal Assessment Criteria and Weight

- IAC0301 Explain the difference between direct versus indirect communication
- IAC0302 Discuss the importance of international business communication
- IAC0303 List and explain specified non-verbal communication that differ from culture to culture
- IAC0304 Explain how to deal with problems with accents and fluency
- IAC0305 Research the different attitudes toward hierarchy and authority of various cultures
- IAC0306 Explain the SOFTEN approach
- IAC0307 Understand how conflicting norms for decision making can affect communication between cultures

(Weight 25%)

5.2.4. KM-05-KT04: Grooming and deportment (25%)

Topic elements to be covered include:

- KT0401 How to enter a room
- KT0402 How to sit, stand, walk and present
- KT0403 Posture
- KT0404 Body language
- KT0405 Skincare and make-up
- KT0406 Wardrobe
- KT0407 Speech and etiquette
- KT0408 First impressions
- KT0409 Personal style and social skills
- KT0410 Hair care and styling
- KT0411 Product knowledge
- KT0412 General hygiene (Range: includes but no limited to too much perfume, odours, i.e. breath or body)

Internal Assessment Criteria and Weight

- IAC0401 Describe the importance of first impressions
- IAC0402 Explain how you represent the organisation's brand
- IAC0403 Explain the proper procedure of greeting guests
- IAC0404 Explain the difference between casual, smart casual, semi-formal, cocktail, and formal wear
- IAC0405 Explain the difference between day and night make-up
- IAC0406 Explain the following terms: jargon, slang, texting language (text-ese) and idioms

(Weight 25%)

5.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Learning resources approved by the AQP
- Assessment documentation, instruments and standards approved by the AQP
- Equipped learning facilitation venue, meeting health and safety standards
- Access for people with disabilities
- Has Access to:
 - Structured examples and scenarios
 - Internet facilities, required literature and research facilities

- Distance and E-learning

Human Resource Requirements:

- Lecturer/learner ratio of 1:30 (Max)
- Lecturers/facilitators need to be qualified at a Level 6 or higher in the relevant field or have at least 3 years relevant experience in Office protocol, deportment and etiquette
- It would be advantageous if lecturers are registered with a relevant Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

5.4 Exemptions

- None

6. 334302001-KM-06, Business communication and customer services, NQF Level 5, Credits 8

6.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of the application of business communication principles through creation of effective business documents and oral presentations. On completion of this module students will have the ability manage diverse relationships through positive communication skills.

The learning will enable learners to demonstrate an understanding of:

- KM-06-KT01: Concise business communication media (13%)
- KM-06-KT02: Organisational communication (13%)
- KM-06-KT03: Multi-cultural communication (13%)
- KM-06-KT04: Oral communication and listening skills (13%)
- KM-06-KT05: Conflict and stress (13%)
- KM-06-KT06: Problem solving and decision making (13%)
- KM-06-KT07: Business letters (13%)
- KM-06-KT08: Report writing (9%)

6.2 Guidelines for Topics

6.2.1. KM-06-KT01: Concise business communication media (13%)

Topic elements to be covered include:

- KT0101 Telephone message
- KT0102 Fax message
- KT0103 Memo
- KT0104 Forms and questionnaires
- KT0105 Email
- KT0106 Notices
- KT0107 Scanning

Internal Assessment Criteria and Weight

- IAC0101 Requirements of a telephone message
- IAC0102 Requirements of a fax message
- IAC0103 Requirements of a memo
- IAC0104 Requirements of forms and questionnaires
- IAC0105 Requirements of e-mail

- IAC0106 Requirements of notices
- IAC0107 Requirements of scanning

(Weight 13%)

6.2.2. KM-06-KT02: Organisational communication (13%)

Topic elements to be covered include:

- KT0201 Corporate culture
- KT0202 External communication
- KT0203 Internal communication
- KT0204 Organisational hierarchy
- KT0205 Formal communication channels
- KT0206 Informal communication channel

Internal Assessment Criteria and Weight

- IAC0201 Definition
- IAC0202 Characteristics
- IAC0203 Types
- IAC0204 Advantages and disadvantages

(Weight 13%)

6.2.3. KM-06-KT03: Multi-cultural communication (13%)

Topic elements to be covered include:

- KT0301 Defining culture
- KT0302 Cultural differences
- KT0303 Possible language barriers in the workplace
- KT0304 Developing multi-cultural communication skills

Internal Assessment Criteria and Weight

- IAC0301 Elements of culture
- IAC0302 Sub-cultures
- IAC0303 Inter-cultural communication problems
- IAC0304 Language barriers- written, oral, non-verbal

(Weight 13%)

6.2.4. KM-06-KT04: Oral communication and listening skills (13%)

Topic elements to be covered include:

- KT0401 Listening skills
- KT0402 Effective oral communication requirements
- KT0403 Improve oral skills
- KT0404 Improve listening skills

Internal Assessment Criteria and Weight

- IAC0401 The role of communication in supervision
- IAC0402 The importance of correct listening techniques and decoding messages are analysed for effectiveness
- IAC0403 Listening and communication techniques are evaluated
- IAC0404 Different types of communication are identified and evaluated for use in the office environment
- IAC0405 The skills for different communication types are described
- IAC0406 Possible barriers to communication are listed and solutions argued
- IAC0407 The importance of communication in the office environment are stated
- IAC0408 The effect of good and poor communication skills on the office is compared
- IAC0409 The role and uses of written communication in the office environment are elaborated

(Weight 13%)

6.2.5. KM-06-KT05: Conflict and stress (13%)

Topic elements to be covered include:

- KT0501 Types of conflict
- KT0502 Causes of conflict
- KT0503 Results of conflict
- KT0504 Coping with conflict
- KT0505 Formal mechanisms to resolving conflict

Internal Assessment Criteria and Weight

- IAC0501 Types
- IAC0502 Causes
- IAC0503 Coping

- IAC0504 Formal mechanisms

(Weight 13%)

6.2.6. KM-06-KT06: Problem solving and decision making (13%)

Topic elements to be covered include:

- KT0601 Role of communication
- KT0602 Decision making process
- KT0603 Stages in the problem solving and decision making process

Internal Assessment Criteria and Weight

- IAC0601 Understand the positive and negative factors of communication
- IAC0602 Explain the factors that influence making sensible decisions
- IAC0603 Apply the general steps of decision making to a known problem
- IAC0604 Evaluate the implemented decision

(Weight 13%)

6.2.7. KM-06-KT07: Business letters (13%)

Topic elements to be covered include:

- KT0701 Letter of enquiry
- KT0702 Letter of complaint
- KT0703 Reply to letter of enquiry
- KT0704 Reply to letter of complaint

Internal Assessment Criteria and Weight

- IAC0701 Layout
- IAC0702 Types of business letters

(Weight 13%)

6.2.8. KM-06-KT08: Report writing (9%)

Topic elements to be covered include:

- KT0801 Format of reports
- KT0802 Feedback report (memo)
- KT0803 Progress report (memo)

- KT0804 Formal report
- KT0805 Informal memo

Internal Assessment Criteria and Weight

- IAC0801 Layout
- IAC0802 Requirements for effective report writing

(Weight 9%)

6.3 Provider Programme Accreditation Criteria

Physical Requirements:

- The provider must have lesson plans and structured learning material or provide learners with access to structured learning material that addresses all the topics in all the knowledge modules.
- In addition the following must be provided:
 - A computer with the necessary software per student in class
 - Printers
 - Access to internet facilities
 - Distance and e-learning modalities available to learners

Human Resource Requirements:

- Lecturer/learner ratio of 1:20 (Max)
- Lecturers need to be qualified at a Level 6 or higher in the relevant field or have at least 5 years relevant experience in Business Communication and Customer Service.
- It would be advantageous if lecturers are registered with a relevant communications Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the Business Communication field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

6.4 Exemptions

- Communication N4: 05140344, Communication N5: 05140395, Communication N6: 05140406, Communication N4: 5140344, Communication N5: 5140395 and Communication N6: 5140406.

7. 334302001-KM-07, Ready for work standards, NQF Level 4, Credits 5

7.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of the overview of the soft skills needed to be an effective member of an organisation through self- management skills .On completion of this module, students will be able to identify explain and adhere to the ethical principles and to conduct themselves with the professional standards applicable in the organisation.

The learning will enable learners to demonstrate an understanding of:

- KM-07-KT01: Rules of professional conduct and ethics (20%)
- KM-07-KT02: Interpersonal management (20%)
- KM-07-KT03: Work-readiness (full office orientation, office etiquette, dress-code) (40%)
- KM-07-KT04: Legislation governing employment (20%)

7.2 Guidelines for Topics

7.2.1. KM-07-KT01: Rules of professional conduct and ethics (20%)

Topic elements to be covered include:

- KT0101 Analysis of issues relating to professional and ethical conduct
- KT0102 Application of professional ethics in practical situations
- KT0103 Identification, explanation and adherence to the ethical principles applicable in the organisation
- KT0104 Identification and application of the procedures and restrictions with regard to confidential information
- KT0105 Standard organizational policies [use of company property/benefits, use of company time, working hours, avoidance of actions that place the organisation at risk/into disrepute] (Acceptable professional behaviour in an organisation, Use of company property and time and risk management)

Internal Assessment Criteria and Weight

- IAC0101 Analyse issues relating to professional and ethical conduct
- IAC0102 Apply professional ethics in practical situations
- IAC0103 Identify, explain and adhere to the ethical principles applicable in the organisation
- IAC0104 Identify and apply the procedures and restrictions with regard to confidential information

(Weight 20%)

7.2.2. KM-07-KT02: Interpersonal management (20%)

Topic elements to be covered include:

- KT0201 Use of time management tools
- KT0202 Techniques that enable the learner to perform under pressure and handle multiple tasks

Internal Assessment Criteria and Weight

- IAC0201 List the time management tools
- IAC0202 Apply time management tools to a given scenario
- IAC0203 Explain, compare and select appropriate tools in a given scenario

(Weight 20%)

7.2.3. KM-07-KT03: Work-readiness (full office orientation, office etiquette, dress-code) (40%)

Topic elements to be covered include:

- KT0301 Office orientation
- KT0302 Office and telephone etiquette
- KT0303 Career development (Range: includes but not limited to: finding a good fit between yourself and the job, job search, preparing for an interview, CV preparation and conduct during an interview)

Internal Assessment Criteria and Weight

- IAC0301 List the important equipment normally used in an office
- IAC0302 Demonstrate the ability to operate important/relevant office equipment (method: simulation, tool: checklist)
- IAC0303 Demonstrate the ability to conduct yourself professionally and communicate effectively over the telephone in an office environment (method: simulation, tool: checklist)
- IAC0304 Draft own CV
- IAC0305 Demonstrate ability to conduct yourself in an interview

(Weight 40%)

7.2.4. KM-07-KT04: Legislation governing employment (20%)

Topic elements to be covered include:

- KT0401 Principles of Basic Conditions of Employment Act

Internal Assessment Criteria and Weight

- IAC0401 List key principles from the Basic Conditions of Employment Act
- IAC0402 Analyse case study for a disciplinary proceeding
- IAC0403 Discuss contractual obligations including leave, employment contract, etc.

(Weight 20%)

7.3 Provider Programme Accreditation Criteria

Physical Requirements:

- The provider must have lesson plans and structured learning material or provide learners with access to structured learning material that addresses all the topics in all the knowledge modules.
- In addition the following must be provided:
 - A computer with the necessary software per student in class
 - Printers
 - Access to internet facilities
 - Distance and e-learning modalities available to learners

Human Resource Requirements:

- Lecturer/learner ratio of 1:20 (Max)
- Lecturers need to be qualified at a Level 6 or higher in the relevant field or have at least 5 years relevant experience.
- It would be advantageous if lecturers are registered with a relevant Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the relevant field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

7.4 Exemptions

- None

8. 334302001-KM-08, Basic business calculations, NQF Level 4, Credits 5

8.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of the skills and knowledge required to use a range of common calculation methods and techniques for conducting routine financial calculations and transactions. It applies to individuals who use literacy and numeracy skills to perform common computational tasks as part of an operational job role.

The learning will enable learners to demonstrate an understanding of:

- KM-08-KT01: Perform financial calculations (20%)
- KM-08-KT02: Select appropriate methods and carry out financial calculations (20%)
- KM-08-KT03: Check calculations and record outcomes (20%)
- KM-08-KT04: Prepare and process banking and petty cash documents (20%)
- KM-08-KT05: Prepare and process invoices for payment to creditors and for debtors (20%)

8.2 Guidelines for Topics

8.2.1. KM-08-KT01: Perform financial calculations (20%)

Topic elements to be covered include:

- KT0101 Obtain data and resources for financial calculations
- KT0102 Obtain input data and verify as relevant for workplace calculations
- KT0103 Determine outcomes of calculations and confirm from task specifications
- KT0104 Acquire relevant resources and equipment to perform calculations effectively
- KT0105 Develop simple spreadsheets where necessary to perform calculations that may be repeated

Internal Assessment Criteria and Weight

- IAC0101 Demonstrate the wise use of credit
- IAC0102 Describe functions of money (medium of exchange, unit of measure, store of value)
- IAC0103 Describe the need for financial information
- IAC0104 Describe types of financial-services providers
- IAC0105 Develop personal budget
- IAC0106 Explain the concept of accounting
- IAC0107 Explain the nature of financial needs (Range: includes but not limited to college, retirement, wills, insurance)
- IAC0108 Explain the need for accounting standards (GAAP)
- IAC0109 Explain the need to save and invest
- IAC0110 Explain the purposes and importance of credit

- IAC0111 Explain the role of finance in business
- IAC0112 Explain the time value of money
- IAC0113 Identify types of currency (Range: includes but not limited to paper money, coins, banknotes, government bonds, treasury notes)
- IAC0114 Maintain financial records
- IAC0115 Prepare bank account documents
- IAC0116 Read and reconcile bank statements

(Weight 1%)

8.2.2. KM-08-KT02: Select appropriate methods and carry out financial calculations (20%)

Topic elements to be covered include:

- KT0201 Use hand held calculators to perform calculations, and identify and obtain other equipment that may be required
- KT0202 Perform calculations to complete work requirements using appropriate techniques
- KT0203 Recheck data used in calculations against task specifications

Internal Assessment Criteria and Weight

- IAC0201 Demonstrate the wise use of credit
- IAC0202 Describe functions of money (medium of exchange, unit of measure, store of value)
- IAC0203 Describe the need for financial information
- IAC0204 Describe types of financial-services providers
- IAC0205 Develop personal budget
- IAC0206 Explain the concept of accounting
- IAC0207 Explain the nature of financial needs (Range: includes but not limited to college, retirement, wills, insurance)
- IAC0208 Explain the need for accounting standards (GAAP)
- IAC0209 Explain the need to save and invest
- IAC0210 Explain the purposes and importance of credit
- IAC0211 Explain the role of finance in business
- IAC0212 Explain the time value of money
- IAC0213 Identify types of currency (Range: includes but not limited to paper money, coins, banknotes, government bonds, treasury notes)
- IAC0214 Maintain financial records

- IAC0215 Prepare bank account documents
- IAC0216 Read and reconcile bank statements

(Weight 1%)

8.2.3. KM-08-KT03: Check calculations and record outcomes (20%)

Topic elements to be covered include:

- KT0301 Check results to ensure calculations are accurate and meet required outcomes, and recognise and correct common computational errors where required
- KT0302 Record calculation results to industry standards and enterprise requirements
- KT0303 Store or electronically file calculation worksheets according to organisational policy and procedures, for future use

Internal Assessment Criteria and Weight

- IAC0301 Demonstrate the wise use of credit
- IAC0302 Describe functions of money (Range: includes but not limited to medium of exchange, unit of measure, store of value)
- IAC0303 Describe the need for financial information
- IAC0304 Describe types of financial-services providers
- IAC0305 Develop personal budget
- IAC0306 Explain the concept of accounting
- IAC0307 Explain the nature of financial needs (Range: includes but not limited to college, retirement, wills, insurance)
- IAC0308 Explain the need for accounting standards (GAAP)
- IAC0309 Explain the need to save and invest
- IAC0310 Explain the purposes and importance of credit
- IAC0311 Explain the role of finance in business
- IAC0312 Explain the time value of money
- IAC0313 Identify types of currency (Range: includes but not limited to paper money, coins, banknotes, government bonds, treasury notes)
- IAC0314 Maintain financial records
- IAC0315 Prepare bank account documents
- IAC0316 Read and reconcile bank statements

(Weight 1%)

8.2.4. KM-08-KT04: Prepare and process banking and petty cash documents (20%)

Topic elements to be covered include:

- KT0401 Enter accurately and balance deposits and withdrawals according to organisational procedures
- KT0402 Check cheques and card vouchers for validity before processing
- KT0403 Reconcile banking documentation with organisations financial records
- KT0404 Check, process and record petty cash claims and vouchers, and balance petty cash book according to organisational procedures

Internal Assessment Criteria and Weight

- IAC0401 Demonstrate the wise use of credit
- IAC0402 Describe functions of money (Range: includes but not limited to medium of exchange, unit of measure, store of value)
- IAC0403 Describe the need for financial information
- IAC0404 Describe types of financial-services providers
- IAC0405 Develop personal budget
- IAC0406 Explain the concept of accounting
- IAC0407 Explain the nature of financial needs (Range: includes but not limited to college, retirement, wills, insurance)
- IAC0408 Explain the need for accounting standards (GAAP)
- IAC0409 Explain the need to save and invest
- IAC0410 Explain the purposes and importance of credit
- IAC0411 Explain the role of finance in business
- IAC0412 Explain the time value of money
- IAC0413 Identify types of currency (Range: includes but not limited to paper money, coins, banknotes, government bonds, treasury notes)
- IAC0414 Maintain financial records
- IAC0415 Prepare bank account documents
- IAC0416 Read and reconcile bank statements

(Weight 1%)

8.2.5. KM-08-KT05: Prepare and process invoices for payment to creditors and for debtors (20%)

Topic elements to be covered include:

- KT0501 Prepare invoices in accordance with organisational procedures

- KT0502 Check invoices against source documents for accuracy and correct any errors
- KT0503 File all invoices and related documents for auditing purposes

Internal Assessment Criteria and Weight

- IAC0501 Demonstrate the wise use of credit
- IAC0502 Describe functions of money (Range: includes but not limited to medium of exchange, unit of measure, store of value)
- IAC0503 Describe the need for financial information
- IAC0504 Describe types of financial-services providers
- IAC0505 Develop personal budget
- IAC0506 Explain the concept of accounting
- IAC0507 Explain the nature of financial needs (Range: includes but not limited to college, retirement, wills, insurance)
- IAC0508 Explain the need for accounting standards (GAAP)
- IAC0509 Explain the need to save and invest
- IAC0510 Explain the purposes and importance of credit
- IAC0511 Explain the role of finance in business
- IAC0512 Explain the time value of money
- IAC0513 Identify types of currency (Range: includes but not limited to paper money, coins, banknotes, government bonds, treasury notes)
- IAC0514 Maintain financial records
- IAC0515 Prepare bank account documents
- IAC0516 Read and reconcile bank statements

(Weight 1%)

8.3 Provider Programme Accreditation Criteria

Physical Requirements:

- The provider must have lesson plans and structured learning material or provide learners with access to structured learning material that addresses all the topics in all the knowledge modules.
- In addition the following must be provided:
 - A computer with the necessary software per student in class
 - Printers
 - Access to internet facilities
 - Distance and e-learning modalities available to learners

Human Resource Requirements:

- Lecturer/learner ratio of 1:20 (Max)
- Lecturers need to be qualified at a Level 6 or higher in the relevant field or have at least 5 years relevant experience in Accounting.
- It would be advantageous if lecturers are registered with a relevant accounting Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the Accounting field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

8.4 Exemptions

- None

9. 334302001-KM-09, Apply End User Computing, NQF Level 3, Credits 6

9.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of End User Computing. It is intended to empower learners to acquire the knowledge required to operate confidently in the basic skill of creating word documents, spreadsheets and presentations. They will also be able to create, send and receive e-mails in the course of their work. The learner will also be able to use the internet to source reliable data in a safe and secure manner for work purposes.

The learning will enable learners to demonstrate an understanding of:

- KM-09-KT01: Understand keyboard functions (5%)
- KM-09-KT02: Create, edit and format word documents (20%)
- KM-09-KT03: Understand and use presentation software (20%)
- KM-09-KT04: Understand and apply GUI based spreadsheet application skills (20%)
- KM-09-KT05: Create, send and receive e-mail messages (20%)
- KM-09-KT06: Demonstrate ability to use the World Wide Web (10%)
- KM-09-KT07: Safety and security of ICT (5%)

9.2 Guidelines for Topics

9.2.1. KM-09-KT01: Understand keyboard functions (5%)

Topic elements to be covered include:

- KT0101 Identify and use a number of keys and explore their effects in a word document. (Range: Alphabetical keys, number keys/number lock, Caps Lock, Enter, Backspace, Delete, Spacebar, Shift, Tab, Ctrl + Alt, Delete and F keys)
- KT0102 Practice using these keys to create and edit a text document, for example using tab key for indenting
- KT0103 Describe the GIGO (Garbage In Garbage Out) principle using a word processor document

Internal Assessment Criteria and Weight

- IAC0101 Key the alphabetic and numeric keys by touch
- IAC0102 Develop good keyboarding techniques
- IAC0103 Key fluently 35 words per minute
- IAC0104 Develop reasonable accuracy
- IAC0105 Proofread documents

(Weight 5%)

9.2.2. KM-09-KT02: Create, edit and format word documents (20%)

Topic elements to be covered include:

- KT0201 Starting a Word processing application
- KT0202 Purpose of using Word processing applications
- KT0203 Use basic features to create and edit and format a document
- KT0204 Document management, formatting and techniques
- KT0205 Importing data from external sources

Internal Assessment Criteria and Weight

- IAC0201 Define the term Word Processing
- IAC0202 List and describe different uses of word processing (types of documents created) to represent information to users
- IAC0203 Describe the benefits of using a word processor
- IAC0204 Describe the characteristics of a good document

(Weight 20%)

9.2.3. KM-09-KT03: Understand and use presentation software (20%)

Topic elements to be covered include:

- KT0301 Use basic features to create, edit and format a presentation
- KT0302 Edit and format a presentation

Internal Assessment Criteria and Weight

- IAC0301 Define the term presentation software
- IAC0302 List and describe different uses of presentations (types of presentations created) to represent information to users
- IAC0303 Describe the benefits of using presentation applications
- IAC0304 Describe the characteristics of a good presentation document
- IAC0305 Discuss how presentations are used to convey information and knowledge and list practical examples of such cases

(Weight 20%)

9.2.4. KM-09-KT04: Understand and apply GUI based spreadsheet application skills (20%)

Topic elements to be covered include:

- KT0401 Spreadsheet applications

Internal Assessment Criteria and Weight

- IAC0401 Define the term spreadsheet processing

- IAC0402 List and describe different uses of spreadsheets (types of documents created) to represent information to users
- IAC0403 Describe the benefits of using a spread sheet application
- IAC0404 Describe the characteristics of a good spreadsheet document
- IAC0405 Discuss how spreadsheets are used to transform data into useful information and list examples of such cases

(Weight 20%)

9.2.5. KM-09-KT05: Create, send and receive e-mail messages (20%)

Topic elements to be covered include:

- KT0501 Concept and terms of electronic messaging
- KT0502 Email etiquette
- KT0503 Internet, e-mail and network e-mail
- KT0504 Various Outlook components
- KT0505 Format messages
- KT0506 Create e-mail folders
- KT0507 Move messages to a folder
- KT0508 Contacts
- KT0509 Internet basics
- KT0510 Intranet and the extranet
- KT0511 Viruses
- KT0512 Spam
- KT0513 Trash

Internal Assessment Criteria and Weight

- IAC0501 Identify the major applications of the internet
- IAC0502 Identify how the World Wide Web can be applied in the intranet and extranet
- IAC0503 Search internet for reliable information
- IAC0504 Open the electronic diary and create an event
- IAC0505 Apply security to settings to minimize viruses, trash and spam

(Weight 20%)

9.2.6. KM-09-KT06: Demonstrate ability to use the World Wide Web (10%)

Topic elements to be covered include:

- KT0601 Introduction to the internet

Internal Assessment Criteria and Weight

- IAC0601 Define the term internet
- IAC0602 Describe the term connectivity
- IAC0603 Discuss the components or constituents and the purpose of internet enabling technologies and terms. (Range: Internet addresses [Internet protocol (IP) addresses and domain names])
- IAC0604 Discuss how data travels over the internet in relation to networking concepts
- IAC0605 Explain the different components required to connect to the internet. (Range: Internet Service Providers (ISPs), wired and wireless connections)

(Weight 10%)

9.2.7. KM-09-KT07: Safety and security of ICT (5%)

Topic elements to be covered include:

- KT0701 ICT risks and recommended security solutions

Internal Assessment Criteria and Weight

- IAC0701 Identify and explain ICT risks and recommended security solution

(Weight 5%)

9.3 Provider Programme Accreditation Criteria

Physical Requirements:

- The provider must have lesson plans and structured learning material or provide learners with access to structured learning material that addresses all the topics in all the knowledge modules.
- In addition the following must be provided:
 - A data projector and a computer with the necessary software in class
 - Printers
 - Access to internet facilities
 - Distance and e-learning modalities available to learners

Human Resource Requirements:

- Lecturer/learner ratio of 1:20 (Max)
- Lecturers/Facilitators need to have at least 5 years events related experience in End User Computing.

- It would be advantageous if lecturers are registered with a relevant Professional Body for Continuous Professional Development purposes
- Assessor and Moderator must have professional recognition in the End User Computing field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

9.4 Exemptions

- None

10. 334302001-KM-10, Business documentation and design, NQF Level 4, Credits 10

10.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of how to develop the skills and knowledge required to establish standards for the design and production of organisational documents and to manage document design and production processes to ensure agreed standards are met. It applies to individuals employed in a range of work environments who require well-developed skills in the use of a range of software packages. They use these skills to establish, document and implement consistent standards of document design within an organisation.

The learning will enable learners to demonstrate an understanding of:

- KM-10-KT01: Establishing documentation standards (20%)
- KM-10-KT02: Managing template design and development (20%)
- KM-10-KT03: Developing standardised text for documents (20%)
- KM-10-KT04: Developing and implementing strategies to ensure the use of standard documentation (20%)
- KM-10-KT05: Develop and implement strategies for maintenance and continuous improvement of standard documentation (20%)

10.2 Guidelines for Topics

10.2.1. KM-10-KT01: Establishing documentation standards (20%)

Topic elements to be covered include:

- KT0101 Organisational and legislative requirements for information entry, storage, output, and quality of document design and production
- KT0102 Present and future information technology capability in terms of its impact on document design and production
- KT0103 Types of documents
- KT0104 Documentation standards and design tasks for organisational

Internal Assessment Criteria and Weight

- IAC0101 Identify organisational and legislative requirements for information entry, storage, output, and quality of document design and production
- IAC0102 Evaluate organisation's present and future information technology capability in terms of its impact on document design and production
- IAC0103 Identify types of documents used and required by organisation
- IAC0104 Establish documentation standards and design tasks for organisational documents in accordance with information, budget and technology requirements

(Weight 20%)

10.2.2. KM-10-KT02: Managing template design and development (20%)

Topic elements to be covered include:

- KT0201 Standard formats and templates to suit the purpose, audience and information requirements of each document
- KT0202 Document templates to meet organisational requirements for style and layout
- KT0203 Templates, organisational and user feedback and amendments

Internal Assessment Criteria and Weight

- IAC0201 Ensure standard formats and templates suit the purpose, audience and information requirements of each document
- IAC0202 Ensure document templates enhance readability and appearance, and meet organisational requirements for style and layout
- IAC0203 Test templates, obtain organisational and user feedback, and make amendments as necessary to ensure maximum efficiency and quality of presentation

(Weight 20%)

10.2.3. KM-10-KT03: Developing standardised text for documents (20%)

Topic elements to be covered include:

- KT0301 Technical functions of software for automating aspects of standard document production
- KT0302 Software functions for production of documents
- KT0303 Macros to in accordance with documentation standards

Internal Assessment Criteria and Weight

- IAC0301 Evaluate complex technical functions of software for their usefulness in automating aspects of standard document production
- IAC0302 Match requirements of each document with software functions to allow efficient production of documents
- IAC0303 Test macros to ensure they meet the requirements of each document in accordance with documentation standards

(Weight 20%)

10.2.4. KM-10-KT04: Developing and implementing strategies to ensure the use of standard documentation (20%)

Topic elements to be covered include:

- KT0401 Explanatory notes for the use of standard
- KT0402 Implement training on the use of standard templates and macros
- KT0403 Master files of templates and macros

Internal Assessment Criteria and Weight

- IAC0401 Prepare explanatory notes for the use of standard templates and macros using content, format and language style to suit existing and future users
- IAC0402 Develop and implement training on the use of standard templates and macros and adjust the content and level of detail to suit user needs
- IAC0403 Produce, circulate, name and store master files and print copies of templates and macros in accordance with organisational requirements

(Weight 20%)

10.2.5. KM-10-KT05: Develop and implement strategies for maintenance and continuous improvement of standard documentation (20%)

Topic elements to be covered include:

- KT0501 Monitor standard documentation templates and macros for quality purposes
- KT0502 Review, plan and implement improvements to documentation standards

Internal Assessment Criteria and Weight

- IAC0501 Monitor use of standard documentation templates and macros, and evaluate the quality of documents produced against documentation standards
- IAC0502 Review documentation standards against the changing needs of the organisation, and plan and implement improvements in accordance with organisational procedures

(Weight 20%)

10.3 Provider Programme Accreditation Criteria

Physical Requirements:

- The provider must have lesson plans and structured learning material or provide learners with access to structured learning material that addresses all the topics in all the knowledge modules.
- In addition the following must be provided:
 - A computer with the necessary software per student in class
 - Printers
 - Access to internet facilities
 - Distance and e-learning modalities available to learners

Human Resource Requirements:

- Lecturer/learner ratio of 1:30 (Max)
- Lecturers/facilitators need to be qualified at a Level 6 or higher in the relevant field or have at least 3 years relevant experience in Business Communication

- It would be advantageous if lecturers are registered with a relevant Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

10.4 Exemptions

- None

11. 334302001-KM-11, Meeting Administration, NQF Level 4, Credits 10

11.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of how to coordinate meetings and do pre and post arrangements for meetings, as well as the documentation supporting and accompanying meetings. Qualifying learners will demonstrate an understanding of arranging venues and catering for meetings, making minor travel and accommodation arrangements and compile meeting packs for delegates.

The learning will enable learners to demonstrate an understanding of:

- KM-11-KT01: Overview of meetings (20%)
- KM-11-KT02: PRE: Meeting logistics and procurement (20%)
- KM-11-KT03: DURING: Procedures of a meeting (20%)
- KM-11-KT04: How to write the minutes (20%)
- KM-11-KT05: POST meeting activities (20%)

11.2 Guidelines for Topics

11.2.1. KM-11-KT01: Overview of meetings (20%)

Topic elements to be covered include:

- KT0101 Definition of the purpose and objectives of meetings
- KT0102 Importance of different meetings
- KT0103 Types of meetings
- KT0104 Role players in a meeting
- KT0105 Technology in meetings (Skype, booking overseas meeting)

Internal Assessment Criteria and Weight

- IAC0101 Identify the type of meeting being organised and its purpose
- IAC0102 Identify and comply with any legal or ethical requirements
- IAC0103 Identify/list objectives of meetings
- IAC0104 Identify requirements of the meeting and its participants
- IAC0105 Understand the different types of meeting - traditional (Range: includes but not limited to: AGM, special meetings, general member meetings, executive meetings) as well as modern (Range: includes but not limited to status update, information sharing, decision making, problem solving, innovation and team building)

(Weight 20%)

11.2.2. KM-11-KT02: PRE: Meeting logistics and procurement (20%)

Topic elements to be covered include:

- KT0201 How to plan a meeting
- KT0202 Preparing the agenda
- KT0203 Notifications of meetings
- KT0204 Meeting packs
- KT0205 Checklist/ "points to ponder" □□

Internal Assessment Criteria and Weight

- IAC0201 List factors to consider when arranging logistics for a meeting/workshop
- IAC0202 Make meeting arrangements in accordance with meeting and participants requirements
- IAC0203 Prepare notice of meeting, agenda and meeting papers in accordance with meeting requirements
- IAC0204 Check documentation for accuracy and correct any errors using appropriate tools
- IAC0205 Distribute documentation to participants within designated timelines
- IAC0206 Discuss the importance of putting together proper meeting packs according to specifications

(Weight 20%)

11.2.3. KM-11-KT03: DURING: Procedures of a meeting (20%)

Topic elements to be covered include:

- KT0301 Meeting procedures and protocol
- KT0302 Decision taking in meetings

Internal Assessment Criteria and Weight

- IAC0301 Understand the purpose of meeting documentation (Range: includes but not limited to attendance register, names of those present, names of visitors, apologies, summaries of decisions and discussions)
- IAC0302 Discuss the role and importance of the relevant role players: chairperson/facilitator, the minute taker, members of the meeting
- IAC0303 Define and understand "jargon"/procedural points during a meeting (Range includes but not limited to point of order, point of information, out of order, protection, quorums)
- IAC0304 Explain the procedure of decision making in meetings including the voting process

(Weight 20%)

11.2.4. KM-11-KT04: How to write the minutes (20%)

Topic elements to be covered include:

- KT0401 How to write effective minutes
- KT0402 Reviewing, adding additional notes and clarifying points raised
- KT0403 Checking for sufficient detail
- KT0404 Editing

Internal Assessment Criteria and Weight

- IAC0401 Understand the process of taking notes with the required speed and accuracy to ensure an accurate record of the meeting
- IAC0402 Review your outline, add additional notes and clarify points raised
- IAC0403 Check to ensure all decisions, motions and actions are noted
- IAC0404 Edit/proofread draft minutes to ensure minutes are brief and clear for easy reading and understanding

(Weight 20%)

11.2.5. KM-11-KT05: POST meeting activities (20%)

Topic elements to be covered include:

- KT0501 Distributing/sharing meeting minutes
- KT0502 Filing and storage of meeting minutes

Internal Assessment Criteria and Weight

- IAC0501 Online sharing
- IAC0502 Sharing on cloud
- IAC0503 Tools for sharing meeting minutes (Range: includes Google docs, OneNote, Evernote, Meeting Mix, TextMate, Agreedo)
- IAC0504 File and store the minutes of meetings according to company policy digitally/manually

(Weight 20%)

11.3 Provider Programme Accreditation Criteria

Physical Requirements:

- The provider must have lesson plans and structured learning material or provide learners with access to structured learning material that addresses all the topics in all the knowledge modules.
- In addition the following must be provided:
 - A computer with the necessary software per student in class
 - Printers
 - Access to internet facilities

- Distance and e-learning modalities available to learners.

Human Resource Requirements:

- Lecturer/learner ratio of 1:20 (Max)
- Lecturers need to be qualified at a Level 6 or higher in the relevant field or have at least 5 years relevant experience in Office Management.
- It would be advantageous if lecturers are registered with a relevant Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the Office Management field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

11.4 Exemptions

- None

12. 334302001-KM-12, Introductory project management, NQF Level 4, Credits 2

12.1 Purpose of the Knowledge Modules

The main focus of the learning in this knowledge module is to build an understanding of the key elements of the project management life-cycle and covers: planning and scheduling, communication, teamwork, resource management, project risk management and project reviews.

The learning will enable learners to demonstrate an understanding of:

- KM-12-KT01: Project management and the operating environment (10%)
- KM-12-KT02: Project Life cycle (10%)
- KM-12-KT03: Management structures by which projects operate (10%)
- KM-12-KT04: Project management planning (10%)
- KM-12-KT05: Scope management (10%)
- KM-12-KT06: Scheduling and resource management (10%)
- KM-12-KT07: Risk management and issue management (10%)
- KM-12-KT08: Project quality management (10%)
- KM-12-KT09: Communication (10%)
- KM-12-KT10: Leadership and teamwork (10%)

12.2 Guidelines for Topics

12.2.1. KM-12-KT01: Project management and the operating environment (10%)

Topic elements to be covered include:

- KT0101 Definition project, project management
- KT0102 Key purpose of project management
- KT0103 Definition programme management and portfolio management
- KT0104 Relationship of programme management and portfolio management to project management
- KT0105 Differences between project and business as usual
- KT0106 Benefits of effective project management
- KT0107 Project environment

Internal Assessment Criteria and Weight

- IAC0101 Define a project
- IAC0102 Identify the differences between a project and business as usual
- IAC0103 Define project management
- IAC0104 State the key purpose of project management
- IAC0105 List the core components of project management

- IAC0106 List the benefits to an organisation of effective project management
- IAC0107 Define programme and portfolio management and their relationship with project management
- IAC0108 Define the term project environment

(Weight 10%)

12.2.2. KM-12-KT02: Project life cycle (10%)

Topic elements to be covered include:

- KT0201 Phases
- KT0202 Reasons for structuring projects into phases
- KT0203 Handover and closure

Internal Assessment Criteria and Weight

- IAC0201 Define the term project life cycle
- IAC0202 State the phases of a typical project life cycle
- IAC0203 Identify reasons for structuring projects into phases

(Weight 10%)

12.2.3. KM-12-KT03: Management structures by which projects operate (10%)

Topic elements to be covered include:

- KT0301 Roles and responsibilities
- KT0302 Project manager
- KT0303 Project sponsor
- KT0304 Project steering group/board
- KT0305 Project team members
- KT0306 End user

Internal Assessment Criteria and Weight

- IAC0301 Define the roles and responsibilities of:
 - project manager
 - project sponsor
 - project steering group/board
 - project team members

- project office
- end users

(Weight 10%)

12.2.4. KM-12-KT04: Project management planning (10%)

Topic elements to be covered include:

- KT0401 Project management plan (Range: includes but not limited to purpose of and benefits)
- KT0402 Ownership and approval of project management plan
- KT0403 Purpose of a business case
- KT0404 Role of the sponsor and project manager in relation to the business case
- KT0405 Purpose of benefits management
- KT0406 Use of KPIs
- KT0407 Stakeholder management and stakeholder analysis
- KT0408 Estimating and estimating funnel
- KT0409 Project success criteria
- KT0410 Success factors
- KT0411 Project reporting

Internal Assessment Criteria and Weight

- IAC0401 State the main purpose of a project management plan
- IAC0402 Define who is involved in the creation of the project management plan
- IAC0403 Explain why the project management plan needs to be approved, owned and shared
- IAC0404 Identify the purpose and the typical content of a business case
- IAC0405 Define the role of the sponsor and project manager in relation to the business case
- IAC0406 Define stakeholders and stakeholder management and explain why stakeholder analysis is important
- IAC0407 Define benefits management
- IAC0408 Define the use of KPIs
- IAC0409 Identify typical estimating methods (Range: includes but not limited to analytical, comparative, parametric)
- IAC0410 Describe the estimating funnel
- IAC0411 Define success criteria in the context of managing projects
- IAC0412 Identify typical success factors that may contribute to successful projects

- IAC0413 Define the purpose and benefits of project reporting

(Weight 10%)

12.2.5. KM-12-KT05: Scope management (10%)

Topic elements to be covered include:

- KT0501 Definition scope management
- KT0502 Product Breakdown Structure (PBS), Work Breakdown Structure (WBS)

Internal Assessment Criteria and Weight

- IAC0501 Define project scope management
- IAC0502 Describe how PBS and WBS are used to illustrate the scope of work required
- IAC0503 Define the following in relation to scope management: configuration management and change control

(Weight 10%)

12.2.6. KM-12-KT06: Scheduling and resource management (10%)

Topic elements to be covered include:

- KT0601 Total float, critical path, Gantt chart, baseline, milestone
- KT0602 Definition resource management
- KT0603 Types of resources
- KT0604 Resource smoothing/resource levelling
- KT0605 Procurement

Internal Assessment Criteria and Weight

- IAC0601 Identify the purpose of scheduling
- IAC0602 Outline different approaches to scheduling [Range: includes but not limited to critical path analysis, total float, Gantt (bar)charts, baseline and milestone]
- IAC0603 Define resource management
- IAC0604 Define procurement within the context of project management
- IAC0605 List different categories and types of resources needed for projects

(Weight 10%)

12.2.7. KM-12-KT07: Risk management and issue management (10%)

Topic elements to be covered include:

- KT0701 Definition of project risk and risk management
- KT0702 Project risk management process
- KT0703 Use of risk register
- KT0704 Definition issue and issue management
- KT0705 Use of issue log
- KT0706 Escalation process

Internal Assessment Criteria and Weight

- IAC0701 Define risk
- IAC0702 Define risk management
- IAC0703 Explain the purpose of risk management
- IAC0704 Outline a high level risk management process
- IAC0705 Describe the use of a risk register
- IAC0706 Define an issue
- IAC0707 Define issue management
- IAC0708 Explain the difference between an issue and a risk
- IAC0709 Describe the use of an issue log

(Weight 10%)

12.2.8. KM-12-KT08: Project quality management (10%)

Topic elements to be covered include:

- KT0801 Definition quality and quality management
- KT0802 Definition quality planning, quality assurance, quality
- KT0803 Control and continual improvement
- KT0804 Differences between quality assurance and quality control
- KT0805 Project reviews, gate post, benefit, peer reviews

Internal Assessment Criteria and Weight

- IAC0801 Define quality
- IAC0802 Define quality management
- IAC0803 Define the following: quality planning, quality assurance, quality control and continual improvement
- IAC0804 Outline the difference between quality control and quality assurance

- IAC0805 Identify the purpose of: gate reviews, post project reviews, benefit reviews, peer reviews and project audits

(Weight 10%)

12.2.9. KM-12-KT09: Communication (10%)

Topic elements to be covered include:

- KT0901 Definition of communication
- KT0902 Methods of communication
- KT0903 Barriers to communication
- KT0904 Effective communication
- KT0905 Communication plan

Internal Assessment Criteria and Weight

- IAC0901 Define communication
- IAC0902 Outline different media for communication
- IAC0903 Identify barriers to effective communication
- IAC0904 Identify ways to facilitate effective communication
- IAC0905 Define the contents of a communication plan
- IAC0906 Explain the benefits of a communication plan

(Weight 10%)

12.2.10. KM-12-KT10: Leadership and teamwork (10%)

Topic elements to be covered include:

- KT1001 Definition leadership
- KT1002 Role of project team leader
- KT1003 Definition project team
- KT1004 Teamwork models

Internal Assessment Criteria and Weight

- IAC1001 Define leadership
- IAC1002 Outline how a project team leader can influence team performance
- IAC1003 Define what is meant by the term project team
- IAC1004 Outline the advantages and disadvantages of team models

(Weight 10%)

12.3 Provider Programme Accreditation Criteria

Physical Requirements:

- The provider must have lesson plans and structured learning material or provide learners with access to structured learning material that addresses all the topics in all the knowledge modules.
- In addition the following must be provided:
 - A computer with the necessary software per student in class
 - Printers
 - Access to internet facilities
 - Distance and e-learning modalities available to learners

Human Resource Requirements:

- Lecturer/learner ratio of 1:20 (Max)
- Lecturers need to be qualified at a Level 6 or higher in the relevant field or have at least 5 years relevant experience in Project Management
- It would be advantageous if lecturers are registered with a relevant accounting Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the Project Management field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue,(i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

12.4 Exemptions

- None

SECTION 3B: PRACTICAL SKILL MODULE SPECIFICATIONS

List of Practical Skill Module Specifications

- 334302001-PM-01, Create a trip itinerary, NQF Level 5, Credits 15
- 334302001-PM-02, Address protocol requirements , NQF Level 5, Credits 5
- 334302001-PM-03, Determine, acquire and allocate resources for the secretarial unit, NQF Level 5, Credits 10
- 334302001-PM-04, Design and develop complex text documents, NQF Level 5, Credits 5
- 334302001-PM-05, Manage a small project , NQF Level 5, Credits 10
- 334302001-PM-06, Support the recruitment, selection and induction of staff, NQF Level 5, Credits 10
- 334302001-PM-07, Apply communication and effective customer relationships , NQF Level 5, Credits 10
- 334302001-PM-08, Organise meetings, NQF Level 5, Credits 10

1. 334302001-PM-01, Create a trip itinerary, NQF Level 5, Credits 15

1.1 Purpose of the Practical Skill Modules

The focus of the learning in this module is on providing the learner an opportunity to build an opportunity to create an appropriate itinerary. It requires the ability to clarify the budget for the trip, identify preferred modes of travel, travel timings, overnight stays and meet the requirements of the meeting schedule. The learning has particular application for a diverse range of domestic products and services and applies to the full range of industry sectors

The learner will be required to:

- PM-01-PS01: Establish the exact requirements for the trip
- PM-01-PS02: Complete necessary documentation
- PM-01-PS03: Select appropriate venues
- PM-01-PS04: Select appropriate transport
- PM-01-PS05: Create an itinerary

1.2 Guidelines for Practical Skills

1.2.1. PM-01-PS01: Establish the exact requirements for the trip

Scope of Practical Skill

Given a case study with the following information, which includes but is not limited to the following: budget for trip, preferred modes of travel, destination/s, length of stay and transport needed the learner must be able to:

- PA0101 Clarify the budget for the trip
- PA0102 Identify preferred modes of travel
- PA0103 Determine overnight stays
- PA0104 Meeting dates and venues and person/s
- PA0105 Research health requirements, entry requirements, local currency exchange rate and any other as needed

Applied Knowledge

- AK0101 Relevant policy and procedures on procurement standards
- AK0102 Confidentiality of information
- AK0103 Concise communication standards
- AK0104 Code of conduct
- AK0105 Protocol deportment and etiquette
- AK0106 Itinerary Planning
- AK0107 Problem solving
- AK0108 Planning and organizing skills

Internal Assessment Criteria

- IAC0101 The budget is clarified as per financial specifications
- IAC0102 Modes of travel is correctly identified
- IAC0103 Overnight accommodation is determined
- IAC0104 Dates, venues, meetings and persons involved are confirmed
- IAC0105 Necessary additional requirements (Range: includes but not limited to entry requirements, local currency exchange rate and health requirements are researched)

1.2.2. PM-01-PS02: Complete necessary documentation

Scope of Practical Skill

Given a case study and necessary documentation with the following information, which includes but is not limited to the following: budget for trip, preferred modes of travel, destination/s, length of stay and transport needed the learner must be able to:

- PA0201 Submission documentation
- PA0202 Procurement documentation
- PA0203 Travel documentation
- PA0204 Travel routes
- PA0205 Research of the following but is not limited to the: protocol, time zones, weather issues

Applied Knowledge

- AK0201 Relevant policy and procedures on procurement standards
- AK0202 Confidentiality of information
- AK0203 Concise communication standards
- AK0204 Code of conduct
- AK0205 Protocol deportment and etiquette
- AK0206 Itinerary Planning
- AK0207 Problem solving
- AK0208 Planning and organizing skills

Internal Assessment Criteria

- IAC0201: Submission documentation is completed according to specifications
- IAC0202: Procurement documentation is completed to meet legislative and company requirements
- IAC0203: Appropriate travel documentation is prepared for each trip
- IAC0204: Travel routes are researched and documented

- IAC0205: Additional travel information is researched (Range: includes but not limited to protocol, time zones, weather issues)

1.2.3. PM-01-PS03: Select appropriate venues

Scope of Practical Skill

Given a case study and necessary documentation and internet access as well as brochures with the following information, which includes but is not limited to the following: budget for trip, preferred modes of travel, destination/s, length of stay and transport needed the learner must be able to:

- PA0301 Source accommodation venues
- PA0302 Source meeting venues
- PA0303 Confirm venues

Applied Knowledge

- AK0301 Relevant policy and procedures on procurement standards
- AK0302 Confidentiality of information
- AK0303 Concise communication standards
- AK0304 Code of conduct
- AK0305 Protocol deportment and etiquette
- AK0306 Itinerary planning
- AK0307 Problem solving
- AK0308 Planning and organizing skills

Internal Assessment Criteria

- IAC0301: Appropriate accommodation venues are sourced
- IAC0302: Appropriate meeting venues are sourced
- IAC0303: Venues are confirmed according to company policies and procedures
- IAC0304: Complete all transactions within designated timeframes

1.2.4. PM-01-PS04: Select appropriate transport

Scope of Practical Skill

Given a case study and necessary documentation and internet access as well as brochures with the following information, which includes but is not limited to the following: budget for trip, preferred modes of travel, destination/s, length of stay and transport needed the learner must be able to:

- PA0401 Research price comparison websites and the airlines own sites to get the best deals on flights and hotels
- PA0402 Book a flexible-fare flight, in the event something unplanned arises; it makes it easier to rearrange bookings

- PA0403 Allow for delays at airports even to the extent of booking a flight the day prior, to allow for arrival at destination timeously
- PA0404 Be sure to include the name of the airport since many larger cities have more than one

Applied Knowledge

- AK0401 Relevant policy and procedures on procurement standards
- AK0402 Confidentiality of information
- AK0403 Concise communication standards
- AK0404 Code of conduct
- AK0405 Protocol deportment and etiquette
- AK0406 Itinerary planning
- AK0407 Problem solving
- AK0408 Planning and organizing skills

Internal Assessment Criteria

- IAC0401: Best deals on flights and hotels are researched and compared via comparison websites
- IAC0402: A flexible-fare flight is booked, to accommodate any changes
- IAC0403: Provision of possible additional travelling time is considered to accommodate flight delays
- IAC0404: Airport terminals are clearly identified
- IAC0405: Complete all transactions within designated timeframe

1.2.5. PM-01-PS05: Create an itinerary

Scope of Practical Skill

Given a case study and necessary documentation and internet access as well as brochures with the following information, which includes but is not limited to the following: budget for trip, preferred modes of travel, destination/s, length of stay and transport needed the learner must be able to:

- PA0501 Create an itinerary template
- PA0502 Research various online travel planning applications to assist in accurate planning
- PA0503 The Itinerary should contain the following information:

Flights:

- Flight dates & times
- Flight numbers
- Frequent flier program number
- The name and location of departing airport
- Airport terminal number

- Transportation to departing airport information
- The name and location of arriving airport

Accommodation:

- The name, address and telephone number for hotel
- Hotel reservation number
- Meeting venue

Transportation:

- Transportation from the airport to accommodation
- How to travel, how long it will take and how much it will cost
- Names and contact numbers for client contacts
- Names and contact numbers for all travel partners
- Business agenda during his business trip
- Time and location for all meetings and the meeting agenda
- Time and location for all events

Applied Knowledge

- AK0501 Relevant policy and procedures on procurement standards
- AK0502 Confidentiality of information
- AK0503 Concise communication standards
- AK0504 Code of conduct
- AK0505 Protocol deportment and etiquette
- AK0506 Itinerary Planning
- AK0507 Problem solving
- AK0508 Planning and organizing skills

Internal Assessment Criteria

- IAC0501: An itinerary template is created according to given specifications
- IAC0502: Online travel planning applications are researched to assist in planning activities
- IAC0503: The Itinerary is designed includes but is not limited to the following information:

Flights

- Flight dates & times
- Flight numbers
- Frequent flier program number

- The name and location of departing airport
- Airport terminal number
- Transportation to departing airport information
- The name and location of arriving airport

1.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Learning resources approved by the AQP
- Assessment documentation, instruments and standards approved by the AQP
- Equipped learning facilitation venue, meeting health and safety standards
- Access for people with disabilities
- Has Access to:
 - Structured examples and scenarios
 - Internet facilities, required literature and research facilities
 - Distance and E-learning

Human Resource Requirements:

- Lecturer/learner ratio of 1:30 (Max)
- Lecturers/facilitators need to be qualified at a Level 6 or higher in the relevant field or have at least 3 years relevant experience in Office Management
- It would be advantageous if lecturers are registered with a relevant Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

1.4 Exemptions

- None

2. 334302001-PM-02, Address protocol requirements, NQF Level 5, Credits 5

2.1 Purpose of the Practical Skill Modules

The focus of the learning in this module is on providing the learner an opportunity to acquire skills and knowledge required to source and provide information and advice for protocol issues that affects a broad range of business and government activity and the breadth and depth of protocol knowledge required will vary. This is not about having an in depth knowledge of protocol requirements but focuses on the ability to collect and interpret protocol information.

The learner will be required to:

- PM-02-PS01: Source information on appropriate protocol
- PM-02-PS02: Coordinate the use of protocol
- PM-02-PS03: Update knowledge of protocol

2.2 Guidelines for Practical Skills

2.2.1. PM-02-PS01: Source information on appropriate protocol

Scope of Practical Skill

Given a range of practical skills and activities to assess the individual's ability to source information on appropriate protocol in various scenarios which includes, but is not limited to the following:

- direct observation, using roles plays, of the individual addressing and introducing dignitaries and officials
- source information on protocol
- coordinate the use of correct protocol for the delivery of products and services
- evaluation of documents prepared by the individual which include use of protocol:
 - briefing papers
 - correspondence to dignitaries and officials
 - invitations
 - marketing materials
 - running sheets, the learner must be able to:
- PA0101 Assess the need for protocol to be followed for the particular situation
- PA0102 Identify relevant sources of protocol information
- PA0103 Liaise with stakeholders to determine appropriate protocol
- PA0104 Interpret relevant protocol information to inform team members

Applied Knowledge

- AK0101 Importance and role of protocol in different event situations
- AK0102 Basic research skills
- AK0103 Key sources of information on protocol
- AK0104 Forms of address for different VIPs and dignitaries, both for written correspondence and in oral communication:
 - invitations to VIPs

- arrival procedures, including for heads of state or government officials
- introduction protocols and order of speakers
- order of precedence for official guests
- seating arrangements
- dress styles
- greetings

Internal Assessment Criteria

- IAC0101 Protocol need identified situation specific
- IAC0102 Source of protocol information identified
- IAC0103 Appropriate protocol determined in conjunction with stakeholders
- IAC0104 Relevant protocol information documented and shared accordingly

2.2.2. PM-02-PS02: Coordinate the use of protocol

Scope of Practical Skill

Given a range of practical skills and activities to assess the individual's ability to source information on appropriate protocol in various scenarios which includes, but is not limited to the following:

- direct observation, using roles plays, of the individual addressing and introducing dignitaries and officials
- source information on protocol
- coordinate the use of correct protocol for the delivery of products and services
- evaluation of documents prepared by the individual which include use of protocol:
 - briefing papers
 - correspondence to dignitaries and officials
 - invitations
 - marketing materials
 - running sheets, the learner must be able to:
- PA0201 Identify specific event activities that require appropriate use of protocol
- PA0202 Provide protocol briefings to staff and suppliers
- PA0203 Coordinate the use of correct protocol for the delivery of products and services

Applied Knowledge

- AK0201 Importance and role of protocol in different business situations
- AK0202 Basic research skills
- AK0203 Key sources of information on protocol
- AK0204 Forms of address for different VIPs and dignitaries, both for written correspondence and in oral communication:
 - invitations to VIPs

- arrival procedures, including for heads of state or government officials
- introduction protocols and order of speakers
- order of precedence for official guests
- seating arrangements
- dress styles
- greetings

Internal Assessment Criteria

- IAC0201 Appropriate use of protocol identified according to event activities
- IAC0202 Protocol briefing conducted with relevant team members and service providers
- IAC0203 Correct protocol followed for the delivery of products and services to relevant stakeholders

2.2.3. PM-02-PS03: Update knowledge of protocol

Scope of Practical Skill

Given a range of practical skills and activities to assess the individual's ability to source information on appropriate protocol in various scenarios which includes, but is not limited to the following:

- direct observation, using roles plays, of the individual addressing and introducing dignitaries and officials
- source information on protocol
- coordinate the use of correct protocol for the delivery of products and services
- evaluation of documents prepared by the individual which include use of protocol:
 - briefing papers
 - correspondence to dignitaries and officials
 - invitations
 - marketing materials
 - running sheets, the learner must be able to:
- PA0301 Identify and use opportunities to update protocol knowledge
- PA0302 Share updated knowledge with stakeholders and team members

Applied Knowledge

- AK0301 Importance and role of protocol in different business situations
- AK0302 Basic research skills
- AK0303 Key sources of information on protocol
- AK0304 Forms of address for different VIPs and dignitaries, both for written correspondence and in oral communication:
 - invitations to VIPs
 - arrival procedures, including for heads of state or government officials
 - introduction protocols and order of speakers

- order of precedence for official guests
- seating arrangements
- dress styles
- greetings

Internal Assessment Criteria

- IAC0301 Opportunities to update protocol knowledge, identified and recorded
- IAC0302 Update protocol knowledge documented and communicated with stakeholders

2.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Learning resources approved by the AQP
- Assessment documentation, instruments and standards approved by the AQP
- Equipped learning facilitation venue, meeting health and safety standards
- Access for people with disabilities
- Has Access to:
 - Structured examples and scenarios
 - Internet facilities, required literature and research facilities
 - Distance and E-learning

Human Resource Requirements:

- Lecturer/learner ratio of 1:30 (Max)
- Lecturers/facilitators need to be qualified at a Level 6 or higher in the relevant field or have at least 3 years relevant experience in Office protocol and department
- It would be advantageous if lecturers are registered with a relevant Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

2.4 Exemptions

- None

3. 334302001-PM-03, Determine, acquire and allocate resources for the secretarial unit, NQF Level 5, Credits 10

3.1 Purpose of the Practical Skill Modules

The focus of the learning in this module is on providing the learner an opportunity to apply the skills and knowledge required to apply the procurement processes and procedures for resources needed in the secretarial unit, through procurement planning, acquisition and allocation according to ethical operational practices.

The learner will be required to:

- PM-03-PS01: Create an asset and supplier register for ordering of office supplies
- PM-03-PS02: Determine, acquire and allocate resources according to requirements
- PM-03-PS03: Review compliance to ethical operational practices

3.2 Guidelines for Practical Skills

3.2.1. PM-03-PS01: Create an asset and supplier register for ordering of office supplies

Scope of Practical Skill

Given necessary equipment or be exposed to real resources where necessary, the learner must be able to:

- PA0101 Create an asset register
- PA0102 Create a database of approved suppliers
- PA0103 Maintain a contact list of internal and external stakeholders
- PA0104 Compile a guideline document that indicates the process flow of resource procurement and distribution

Applied Knowledge

- AK0101 Relevant policy and procedures on Supply Chain Management standards
- AK0102 Confidentiality of information
- AK0103 Code of conduct
- AK0104 Asset management

Internal Assessment Criteria

- IAC0101 Asset register is created as per given case study
- IAC0102 Asset register is updated according to organisational standards
- IAC0103 The process of ordering office supplies is explained
- IAC0104 A contact list of stakeholders is prepared as per given case study
- IAC0105 Procurement documents are prepared as per given specifications

3.2.2. PM-03-PS02: Determine, acquire and allocate resources according to requirements

Scope of Practical Skill

Given work instructions, checklists, case studies, activity documents, any templates, forms and standard operating procedures available, the learner must be able to:

- PA0201 Resource requirements are identified in accordance with business and operational plans, and organisational requirements
- PA0202 Utilise available budget resources to procure goods
- PA0203 Acquire physical resources and services in accordance with organisational requirements
- PA0204 Check resources to ensure quality and quantity, in line with service agreements
- PA0205 Allocate resources promptly to enable achievement of objectives

Applied Knowledge

- AK0201 Document management system
- AK0202 Quality assurance of suppliers and resources
- AK0203 Workflow systems implementation
- AK0204 Standard supply chain policy and procedures
- AK0205 Workflow implementation

Internal Assessment Criteria

- IAC0201 Quality management process of suppliers and resources is compiled in a document pack to be used during procurement
- IAC0202 A guideline is designed on quality standards to be maintained during the execution of operational activities
- IAC0203 Supply chain information is captured and shared
- IAC0204 A checklist is designed to interpret terms and conditions of SLAs (Service Level agreements) to maintain company performance standards
- IAC0205 A report is written on challenges in the supply chain and proposals made for value add interventions to be implemented in the organisation
- IAC0206 All relevant information given on selected suppliers is captured for retrieval when necessary

3.2.3. PM-03-PS03: Review compliance to ethical operational practices in the organisation

Scope of Practical Skill

Given work instructions, checklists, case studies, activity documents, any templates, forms, safety and quality principles and standard operating procedures available, the learner must be able to:

- PA0301 Identify ethical practices within the supply chain environment
- PA0302 Report on ethical conduct aligned to operational requirements
- PA0303 Identify the potential sources of unethical conduct

- PA0304 Propose remedial action

Applied Knowledge

- AK0301 Ethical standards as per policy and procedures
- AK0302 Code of conduct

Internal Assessment Criteria

- IAC0301 Potential conflicts between organisational demands and professional or ethical standards are identified and described
- IAC0302 Possible unethical practices and potential triggers within the organisation are identified
- IAC0303 Professional boundaries are assessed in accordance with current legislation and codes of practice applicable to the area of operation
- IAC0304 An assessment report is compiled proposing remedial actions to improve ethical conduct within the unit and the organisation

3.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Learning resources approved by the AQP
- Assessment documentation, instruments and standards approved by the AQP
- Equipped learning facilitation venue, meeting health and safety standards
- Access for people with disabilities
- Has Access to:
 - Structured examples and scenarios
 - Internet facilities, required literature and research facilities
 - Distance and E-learning

Human Resource Requirements:

- Lecturer/learner ratio of 1:30 (Max)
- Lecturers/facilitators need to be qualified at a Level 6 or higher in the relevant field or have at least 3 years relevant experience in Supply Chain/Asset or Financial Management
- It would be advantageous if lecturers are registered with a relevant Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)

- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

3.4 Exemptions

- None

4. 334302001-PM-04, Design and develop complex text documents, NQF Level 5, Credits 5

4.1 Purpose of the Practical Skill Modules

The focus of the learning in this module is on providing the learner an opportunity to practice the skills and knowledge required to design and develop business documents using complex technical features of word processing software. It applies to individuals who work in a range of business environments and have skills which may be applied in the provision of administrative support within an enterprise, or by technical/knowledge experts responsible for producing their own word processed documents.

The learner will be required to:

- PM-04-PS01: Prepare to produce word processed documents
- PM-04-PS02: Design complex documents
- PM-04-PS03: Add complex tables and other data
- PM-04-PS04: Produce documents

4.2 Guidelines for Practical Skills

4.2.1. PM-04-PS01: Prepare to produce word processed documents

Scope of Practical Skill

Given necessary equipment or be exposed to real resources where necessary the learner must be able to:

- PA0101 Use safe work practices to ensure ergonomic, work organisation, energy and resource conservation requirements are met
- PA0102 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required
- PA0103 Identify organisational requirements for text based business documents to ensure consistency of style and image
- PA0104 Evaluate complex technical functions of software for its usefulness in fulfilling requirements of the task
- PA0105 Match document requirements with software functions to provide efficient production of documents

Applied Knowledge

- AK0101 Various organisational policy and procedures on communication standards
- AK0102 Confidentiality of information
- AK0103 Concise communication standards
- AK0104 End User Computing skills
- AK0105 Information Processing skills

Internal Assessment Criteria

- IAC0101 Safe work practices are applied to ensure ergonomic, work organisation, energy and resource conservation requirements are met

- IAC0102 Document purpose, audience and presentation requirements are clarified with relevant personnel as required
- IAC0103 Text based business documents are designed according to organisational requirements to ensure consistency of style and image
- IAC0104 Document requirements are matched with software functions to provide efficient production of documents

4.2.2. PM-04-PS02: Design complex documents

Scope of Practical Skill

Given necessary equipment or be exposed to real resources where necessary the learner must be able to:

- PA0201 Design document structure and layout to suit purpose, audience and information requirements of task
- PA0202 Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout
- PA0203 Use complex software functions to enable efficient manipulation of information and other material, and ensure consistency of design and layout
- PA0204 Use manuals, user documentation and online help to overcome problems with document design and production

Applied Knowledge

- AK0201 Various organisational policy and procedures on communication standards
- AK0202 Confidentiality of information
- AK0203 Concise communication standards
- AK0204 End User Computing skills
- AK0205 Information Processing skills

Internal Assessment Criteria

- IAC0201 Document structure and layout is designed to suit purpose, audience and information requirements of task
- IAC0202 Documents are designed to enhance readability and appearance, and to meet organisational and task requirements for style and layout
- IAC0203 Complex software functions are used to enable efficient manipulation of information and other material, and ensure consistency of design and layout
- PA0204 Manuals and user documentation as well as online help is utilised to overcome problems with document design and production

4.2.3. PM-04-PS03: Add complex tables and other data

Scope of Practical Skill

Given necessary equipment or be exposed to real resources where necessary the learner must be able to:

- PA0301 Insert a standard table into document, changing cells to meet information requirements

- PA0302 Format rows and columns as required
- PA0303 Insert images and other data, formatting as required

Applied Knowledge

- AK0301 Various organisational policy and procedures on communication standards
- AK0302 Confidentiality of information
- AK0303 Concise communication standards
- AK0304 End User Computing skills
- AK0305 Information Processing skills

Internal Assessment Criteria

- IAC0301 Standard tables are inserted into documents, changing cells to meet information requirements
- IAC0302 Rows and columns are formatted as required
- IAC0303 Images and other data is inserted and formatted as required

4.2.4. PM-04-PS04: Produce documents

Scope of Practical Skill

Given necessary equipment or be exposed to real resources where necessary the learner must be able to:

- PA0401 Use complex operations to develop documents, and achieve required results
- PA0402 Preview, adjust and print documents in accordance with organisational and task requirements
- PA0403 Name and store documents in accordance with organisational requirements and exit application without information loss/damage
- PA0404 Prepare documents within designated timelines and for speed and accuracy

Applied Knowledge

- AK0401 Various organisational policy and procedures on communication standards
- AK0402 Confidentiality of information
- AK0403 Concise communication standards
- AK0404 End User Computing skills
- AK0405 Information Processing skills

Internal Assessment Criteria

- IAC0401 Complex operations are used to develop documents, and achieve required results
- IAC0402 Documents are previewed, adjusted and printed in accordance with organisational and task requirements

- IAC0403 Documents are named and stored in accordance with organisational requirements and applications exited without information loss/damage
- IAC0404 Documents are prepared within designated timelines and for speed and accuracy

4.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Learning resources approved by the AQP
- Assessment documentation, instruments and standards approved by the AQP
- Equipped learning facilitation venue, meeting health and safety standards
- Access for people with disabilities
- Has Access to:
 - Structured examples and scenarios
 - Internet facilities, required literature and research facilities
 - Distance and E-learning

Human Resource Requirements:

- Lecturer/learner ratio of 1:30 (Max)
- Lecturers/facilitators need to be qualified at a Level 6 or higher in the relevant field or have at least 3 years relevant experience in Business Communication
- It would be advantageous if lecturers are registered with a relevant Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

4.4 Exemptions

- None

5. 334302001-PM-05, Manage a small project, NQF Level 5, Credits 10

5.1 Purpose of the Practical Skill Modules

The focus of the learning in this module is on providing the learner an opportunity to run a small project, which has been given approval to proceed to implementation. The learner should preferably use any project management software to schedule project development. This should be provided by hard copy output covering the performance criteria and can be supported by observation and checklists. The resultant skills will enable the candidate to manage and control project resources including project relationships and the budget within the context of efficient management of risk and change.

The learner will be required to:

- PM-05-PS01: Contribute to project initiation, scope definition and scope change control
- PM-05-PS02: Apply time management techniques to a project
- PM-05-PS03: Apply cost management techniques to a project
- PM-05-PS04: Apply quality management techniques to a project
- PM-05-PS05: Apply risk management techniques to a project
- PM-05-PS06: Apply contract and procurement techniques to a project

5.2 Guidelines for Practical Skills

5.2.1. PM-05-PS01: Contribute to project initiation, scope definition and scope change control

Scope of Practical Skill

Given relevant project scenarios of small project/sub-project involving few resources and having a limited impact on stakeholders, the learner must be able to:

- PA0101 Identify and co-ordinate stakeholders, their roles, needs and expectations of the project
- PA0102 Contribute to the identification, description and analysis of the project needs, expectations, constraints, assumptions, exclusions, inclusions and deliverables
- PA0103 Prepare and produce inputs to be used for further planning activities
- PA0104 Monitor the achievement of the project's scope

Applied Knowledge

- AK0101 Time management
- AK0102 Project management skills
- AK0103 Decision making skills
- AK0104 Problem solving skills
- AK0105 Numeracy skills
- AK0106 Digital applications and software functions for project management

Internal Assessment Criteria

- IAC0101 Project stakeholders are identified and their roles on achievement of project outcomes are recorded and or explained with examples
- IAC0102 Project stakeholders needs and expectations are identified and documented according to agreed format
- IAC0103 Project deliverables are verified against the needs of stakeholders
- IAC0104 Approved modifications to stakeholder needs are documented and communicated to relevant parties
- IAC0105 Contribute to the identification, description and analysis of the project needs, expectations, constraints, assumptions, exclusions, inclusions and deliverables
- IAC0106 Objectives are agreed with all relevant parties
- IAC0107 Assumptions, needs, expectations, constraints, exclusions, inclusions and deliverables are identified and recorded according to agreed format
- IAC0108 Work packages are developed and further elaborated to present overall view of the project scope
- IAC0109 A work breakdown structure is developed and documented, within agreed time frames
- IAC0110 Scope documentation is compiled in accordance with instructions and procedures
- IAC0111 Scope document contains a rudimentary sequence of events and/or milestones
- IAC0112 Scope document is communicated to stakeholders for approval
- IAC0113 Measures for project success are recorded in agreed format
- IAC0114 Feedback of progress towards delivering the scope is communicated in agreed manner
- IAC0115 Deviations from scope are identified and opportunities for corrective action or improvement are communicated to relevant individuals/teams
- IAC0116 The impact of scope change is identified, analysed, described and reported according to agreed procedures
- IAC0117 Approved change requests to scope are processed in accordance with project change control procedures
- IAC0118 Project deliverables are verified as complete as per agreed scope definition or specified requirements

5.2.2. PM-05-PS02: Apply time management techniques to a project

Scope of Practical Skill

Given relevant documentation and templates which may include but is not limited to the following: work breakdown structures, task lists, project management plan documents, risk plan, quality plan and communication plan. Schedule representation may include but not limited to Gantt/Bar charts, calendar, list with dates, the learner must be able to:

- PA0201 Demonstrate an understanding of the purpose and process of scheduling project activities

- PA0202 Define and gather information about project activities from technical (subject matter) experts and within own field of expertise
- PA0203 Develop a simple schedule for a project or part thereof

Applied Knowledge

- AK0201 Time management
- AK0202 Project management skills
- AK0203 Decision making skills
- AK0204 Problem solving skills
- AK0205 Numeracy skills
- AK0206 Digital applications and software functions for project management

Internal Assessment Criteria

- IAC0201 The purpose and importance of a schedule of activities on a project is described and explained with examples
- IAC0202 Schedule development process is explained in accordance with established industry practices and with examples
- IAC0203: The differences and implications of project completion within the shortest possible time and at specified due date are explained with examples
- IAC0204: The use of a work breakdown structure in assisting the development of a schedule is explained with examples
- IAC0205: Activities specific to a project are identified and prioritised within objectives and scope of project
- IAC0206: Specific project activities are identified and gathered from technical experts
- IAC0207: Activities are documented at a level of detail to support further planning activities
- IAC0208: Associated documents are updated to reflect identified activities
- IAC0209: Activity dependencies are identified and recorded in agreed format
- IAC0210: An activity sequence is produced and shown in a schedule
- IAC0211: Time duration estimates for activities are sourced from responsible individuals
- IAC0212: The schedule is updated with time duration estimates
- IAC0213: Resources required for activities are identified, allocated to work and documented per activity according to agreed processes and formats
- IAC0214: The project duration is determined and recorded in agreed format
- IAC0215: Project schedule is presented to stakeholders in an agreed format

5.2.3. PM-05-PS03: Apply cost management techniques to a project

Scope of Practical Skill

Given relevant documentation and templates which may include but is not limited to the following: work breakdown structures, task lists, project management plan documents, risk plan, quality plan and communication plan. Schedule representation may include but not limited to Gantt/Bar charts, calendar, list with dates, the learner must be able to:

- PA0301 Identify elements and resources to be costed through interpreting the project scope statement, work breakdown structure and other project data
- PA0302 Participate in the preparation and production of a cost budget
- PA0303 Contribute to the monitoring and controlling of cost budget performance by maintaining records and communicating

Applied Knowledge

- AK0301 Time management
- AK0302 Project management skills
- AK0303 Decision making skills
- AK0304 Problem solving skills
- AK0305 Numeracy skills
- AK0306 Digital applications and software functions for project management

Internal Assessment Criteria

- IAC0301 The work elements are identified and extracted from data
- IAC0302 Cost types (elements) are identified and agreed with financial and/or project management authorities
- IAC0303 Unit costs to be used for cost estimating are agreed with relevant authority
- IAC0304 The resource requirements for work elements are determined in terms of type, quantity and unit cost, and documented in agreed format
- IAC0305 The elements of cost for each work element / package are estimated using agreed rules and procedures
- IAC0306 A cost budget is documented in agreed format and within agreed time frames
- IAC0307 Underlying assumptions of the estimate are explained, motivated and documented in agreed format
- IAC0308 Approval is obtained for the budget from higher authority in accordance with established standards and procedures
- IAC0309 Cost budget figures are balanced and correct in accordance with standard accounting practices
- IAC0310 Cost budget is communicated in a manner that ensures all relevant parties are clear on its contents
- IAC0311 Actual costs against the budget elements are obtained and records updated correctly

- IAC0312 Deviations of actual against budgeted costs are identified and communicated to higher authority
- IAC0313 Opportunities for corrective action or improvement are identified and communicated to relevant individuals/teams
- IAC0314 Financial records are maintained according to agreed standards and procedures

5.2.4. PM-05-PS04: Apply quality management techniques to a project

Scope of Practical Skill

Given relevant documentation and templates which may include but is not limited to the following: work breakdown structures, task lists, project management plan documents, risk plan, quality plan and communication plan. Schedule representation may include but not limited to Gantt/Bar charts, calendar, list with dates, the learner must be able to:

- PA0401 Analysis may include but not limited to simple statistical analysis, comparison of results to baseline or specification
- PA0402 Describe and explain the need for consistent processes and standards to achieve quality
- PA0403 Suggest actions, within own field of expertise, in support of the development of quality project deliverables
- PA0404 Conduct tests as per test plan and communicate test results

Applied Knowledge

- AK0401 Time management
- AK0402 Project management skills
- AK0403 Decision making skills
- AK0404 Problem solving skills
- AK0405 Numeracy skills
- AK0406 Digital applications and software functions for project management

Internal Assessment Criteria

- IAC0401 Quality stakeholders, objectives, levels and standards are identified and explained
- IAC0402 The purpose of quality control on a project is explained with examples
- IAC0403 The processes required to control quality on a project are explained, with examples, in accordance with organisational standards and practices or recognised industry practice
- IAC0404 Reasons for consistent practice are given with examples
- IAC0405 Suggestions are made relating to the project deliverables for ensuring a quality product
- IAC0406 Suggestions are made relating to technical work procedures to ensure safe work environment
- IAC0407 Suggestions are made relating to technical work procedures to ensure quality objectives can be met

- IAC0408 Project quality outcomes are tested according to agreed test plan
- IAC0409 Deviations, non-conformances and exceptions are identified through testing using a test plan and are recorded in the required format
- IAC0410 Records of deviations, non-conformances and exceptions are maintained in an accurate and complete manner
- IAC0411 Basic analysis of test results is conducted in accordance with agreed test plan
- IAC0412 Test results are communicated in accordance with agreed procedures
- IAC0413 Test plan includes but not limited to instructions for testing, results expected and analysis required per result specification

5.2.5. PM-05-PS05: Apply risk management techniques to a project

Scope of Practical Skill

Given relevant documentation and templates which may include but is not limited to the following: work breakdown structures, task lists, project management plan documents, risk plan, quality plan and communication plan. Risk assessment will be in simple terms such as low, medium or high or a scale. Resolution may include fixing, alternative approach, change or acceptance the learner must be able to:

- PA0501 Identify and recognise potential risks that could affect project performance
- PA0502 Contribute to the assessment of the impact and likelihood of identified risks
- PA0503 Contribute to the development of risk management statements and plans
- PA0504 Monitor and control the project risks

Applied Knowledge

- AK0501 Time management
- AK0502 Project management skills
- AK0503 Decision making skills
- AK0504 Problem solving skills
- AK0505 Numeracy skills
- AK0506 Digital applications and software functions for project management

Internal Assessment Criteria

- IAC0501 Potential, perceived and actual risk events are identified, documented and communicated in consultation with appropriate stakeholders
- IAC0502 Triggers, causes, effects and owners are identified in consultation with appropriate stakeholders and recorded in accordance with project procedures
- IAC0503 Risk management factors are explained with examples relating to the risk events
- IAC0504 Likelihood of risk causes are assessed in consultation with appropriate stakeholders and described with examples

- IAC0505 Impact of risk effects are assessed in consultation with appropriate stakeholders and described with examples
- IAC0506 Potential risk events identified are assessed for impact on the project
- IAC0507 Activities to reduce or stop a risk threat arising are identified and documented in agreed format
- IAC0508 Activities to recover from a specific risk threat event are identified and documented in agreed format
- IAC0509 Activities to take advantage if an opportunity arises are identified and documented in agreed format
- IAC0510 The risk threat prevention and recovery activities and opportunity activities are communicated to relevant parties for inclusion in plans and budgets
- IAC0511 Potential project risk events are monitored to enable anticipation or recognition of occurrence
- IAC0512: Issues arising are responded to and monitored to resolution
- IAC0513: Variances identified are reported to higher project authority
- IAC0514: Agreed risk responses are implemented in accordance with plans
- IAC0515: Lessons learned are documented and communicated to relevant parties

5.2.6. PM-05-PS06: Apply contract and procurement techniques to a project

Scope of Practical Skill

Given relevant documentation and templates which may include but is not limited to the following: work breakdown structures, task lists, project management plan documents, risk plan, quality plan and communication plan. Adjudication authority is the body that makes decisions regarding the appointment of suppliers/sellers, the learner must be able to:

- PA0601 Compile and process procurement requests to required standards and needs
- PA0602 Source suppliers/sellers to meet procurement requirements
- PA0603 Receive and evaluate proposals and make recommendations
- PA0604 Maintain and administer procurement records

Applied Knowledge

- AK0601 Time management
- AK0602 Project management skills
- AK0603 Decision making skills
- AK0604 Problem solving skills
- AK0605 Numeracy skills
- AK0606 Digital applications and software functions for project management

Internal Assessment Criteria

- IAC0601: Applicable data is gathered according to requirements, and policies and procedures to compile requests for procurement
- IAC0602: Procurement documentation is compiled in the required format and within agreed time frames
- IAC0603: Procurement documentation is distributed to relevant suppliers/sellers within stipulated time frame
- IAC0604: Procurement request records are maintained according to policies and procedures
- IAC0605: Potential suppliers/sellers are identified, using given criteria, for evaluation purposes
- IAC0606: Potential suppliers/sellers are evaluated against given criteria to determine ability to deliver
- IAC0607: Short list of potential suppliers/sellers is produced according to policies and procedures
- IAC0608: Invitations to bid or provide quotes are extended in accordance with organisational procurement policies, procedures and authority
- IAC0609: Proposal requests are received in accordance with procurement procedures
- IAC0610: Proposal requests are evaluated using given criteria to establish best suitable supplier/seller
- IAC0611: Risks associated with supply of goods and/or services are identified, documented and communicated to relevant parties
- IAC0612: Recommendations are documented according to policies and procedures and presented to adjudication authority
- IAC0613: Project procurement administration system is described with examples of usage
- IAC0614: Procurement documentation is collated and filed in accordance with project procurement administrative systems
- IAC0615: Procurement documentation is processed within confidentiality requirements and in accordance with policies and procedures
- IAC0616: On-going monitoring of supplier delivery is conducted in terms of procurement agreement
- IAC0617: Non-conformance is identified, recorded and reported in accordance with policies and procedures
- IAC0618: Reported non-conformance is resolved in accordance with policies and procedures

5.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Learning resources approved by the AQP
- Assessment documentation, instruments and standards approved by the AQP
- Equipped learning facilitation venue, meeting health and safety standards
- Access for people with disabilities
- Has Access to:

- Structured examples and scenarios
- Internet facilities, required literature and research facilities
- Distance and E-learning

Human Resource Requirements:

- Lecturer/learner ratio of 1:30 (Max)
- Lecturers/facilitators need to be qualified at a Level 6 or higher in the relevant field or have at least 3 years relevant experience in Project Management
- It would be advantageous if lecturers are registered with a relevant Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

5.4 Exemptions

- None

6. 334302001-PM-06, Support the recruitment, selection and induction of staff, NQF Level 5, Credits 10

6.1 Purpose of the Practical Skill Modules

The focus of the learning in this module is on providing the learner an opportunity to develop the competencies related to supporting the recruitment, selection and induction of secretarial staff.

The learner will be required to:

- PM-06-PS01: Support planning for recruitment of secretarial staff
- PM-06-PS02: Plan for selection
- PM-06-PS03: Support selection process
- PM-06-PS04: Induct successful candidate

6.2 Guidelines for Practical Skills

6.2.1. PM-06-PS01: Support planning for recruitment of secretarial staff

Scope of Practical Skill

Given case studies, collaborative classroom activities, role plays and accessing materials online, the learner must be able to:

- PA0101 Obtain approval to fill position and clarify time lines and requirement for appointment of secretarial staff
- PA0102 Assist in preparing job descriptions that accurately reflect the role requirements, according to organisational policies and procedures and legislation, codes, national standards and Workplace Health and Safety (WHS) considerations
- PA0103 Consult with relevant personnel about job descriptions
- PA0104 Assist in ensuring that job descriptions comply with legislative requirements and reflect the organisation's requirements for a diverse workforce
- PA0105 Obtain approvals to advertise position

Applied Knowledge

- AK0101 Relevant human resource policy and procedures
- AK0102 Relevant company media relations policy
- AK0103 Basic knowledge of company recruitment policies and procedures (Range: including but not limited to POPI Act, Employment Equity, Disability, OHS, Basic conditions of employment)
- AK0104 Problem solving skills

Internal Assessment Criteria

- IAC0101 Develop a position description for a new employee
- IAC0102 Explain how to plan for equity in recruitment
- IAC0103 Explain how to resolve problems experienced while planning for recruitment of a candidate

- IAC0104 Discuss recommendations made on problems experienced to improve systems and procedures

6.2.2. PM-06-PS02: Plan for selection

Scope of Practical Skill

Given case studies, collaborative classroom activities, role plays and accessing materials online, the learner must be able to:

- PA0201 Choose appropriate channels and technology to advertise vacancies and/or identify potential talent pool
- PA0202 Advertise vacancies for staffing requirements according to organisational policies and procedures
- PA0203 Consult with relevant personnel to convene selection panel and develop interview questions
- PA0204 Assist in ensuring that interview questions comply with legislative requirements
- PA0205 Assist in short-listing applicants
- PA0206 Schedule interviews and advise relevant people of times, dates and venues

Applied Knowledge

- AK0201 Relevant human resource policy and procedures
- AK0202 Basic knowledge of company recruitment policies and procedures (Range: includes but not limited to POPI Act, Employment Equity, Disability, OHS, Basic conditions of employment)
- AK0203 Problem solving skills
- AK0204 Communication skills

Internal Assessment Criteria

- IAC0201 Develop a suitable advertisement that can be advertised in the local newspaper and another advertisement for online use (Range: includes but is not limited to job title, responsibilities, minimum requirements, procedures to follow for application, contact details, date of appointment and closing date for application)
- IAC0202 Investigate the required format for each purpose and the costs associated with advertising the position
- IAC0203 Design a list of relevant interview questions
- IAC0204 Compile a guideline document on relevant issues pertaining to interviews (Range: this includes but is not limited to advertisements, compiling a selection panel, short-listing and scheduling of interviews)

6.2.3. PM-06-PS03: Support selection process

Scope of Practical Skill

Given case studies, collaborative classroom activities, role plays and accessing materials online, the learner must be able to:

- PA0301 Participate in interview process and assess candidates against agreed selection criteria
- PA0302 Discuss assessment with other selection panel members
- PA0303 Correct biases and deviations from agreed procedures and negotiate for preferred candidate

Applied Knowledge

- AK0301 Relevant human resource policy and procedures
- AK0302 Basic knowledge of company recruitment policies and procedures (Range: including but not limited to POPI Act, Employment Equity, Disability, OHS, Basic conditions of employment)
- AK0303 Problem solving skills
- AK0304 Communication skills

Internal Assessment Criteria

- IAC0301 Design selection criteria for secretarial staff
- IAC0302 Explain how assessment of candidate can be conducted

6.2.4. PM-06-PS04: Induct successful candidate

Scope of Practical Skill

Given case studies, collaborative classroom activities, role plays and accessing materials online to complete necessary documentation according to organisational procedures, observing confidentiality and privacy requirements the learner must be able to:

- PA0401 Prepare induction material for successful candidates.
- PA0402 Arrange successful candidates induction according to organisational policy

Applied Knowledge

- AK0401 Relevant human resource policy and procedures
- AK0402 Basic knowledge of company recruitment policies and procedures (Range: including but not limited to POPI Act, Employment Equity, Disability, OHS, Basic conditions of employment)
- AK0403 Problem solving skills
- AK0404 Communication skills

Internal Assessment Criteria

- IAC0401 Design an induction manual for the organisation for new employees
- IAC0402 Compile a folder with documentation relating to employment contracts and other necessary documentation necessary for a successful candidate to complete
- IAC0403 Communicate the appointment via a memorandum to the necessary staff members to advise them of the new appointment

- IAC0404 Design a process flow to assist in the administrative process of the appointment of a new candidate

6.3 Provider Programme Accreditation Criteria

Physical Requirements:

- The provider must have lesson plans and structured learning material or provide learners with access to structured learning material that addresses all the topics in all the knowledge modules.
- In addition the following must be provided:
 - Access to internet facilities
 - Distance and e-learning modalities available to learners

Human Resource Requirements:

- Lecturer/learner ratio of 1:30 (Max)
- Lecturers need to be qualified at a Level 6 or higher in the relevant field or have at least 5 years relevant experience in Human Resource or Business Administration fields.
- It would be advantageous if lecturers are registered with a relevant Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

6.4 Exemptions

- None

7. 334302001-PM-07, Apply communication and effective customer relationships, NQF Level 5, Credits 10

7.1 Purpose of the Practical Skill Modules

The focus of the learning in this module is on providing the learner an opportunity to apply business communication skills through interaction with internal and external stakeholders. On completion of this module students will have the ability to manage diverse relationships through positive communication and customer service skills.

The learner will be required to:

- PM-07-PS01: General office administration
- PM-07-PS02: Interact with clients via telephone or in branch
- PM-07-PS03: Respond to various customer service scenarios
- PM-07-PS04: Interact with internal and external stakeholders
- PM-07-PS05: Manage the operational customer interaction systems

7.2 Guidelines for Practical Skills

7.2.1. PM-07-PS01: General office administration

Scope of Practical Skill

Given necessary equipment or be exposed to real resources where necessary, the learner must be able to:

- PA0101 Prepare invoices, reports, memos, letters, financial statements and other documents, using word processing, spreadsheet, database, or presentation software
- PA0102 Organize and schedule meetings and appointments
- PA0103 Attend meetings to record minutes
- PA0104 Produce and distribute correspondence memos, letters, faxes, forms and emails to enhance organizational communication to stakeholders
- PA0105 Operate a range of office machines such as photocopiers, computers and faxes
- PA0106 Create an asset register
- PA0107 Maintain an asset register according organisational standards
- PA0108 Order office supplies for the unit
- PA0109 File and retrieve financial documents, records, and reports
- PA0110 Maintain a contact list of internal and external stakeholders
- PA0111 Coordinate travel arrangements for the unit according to organizational standards
- PA0112 Assist in the preparation of regularly scheduled reports

Applied Knowledge

- AK0101 Various organisational policy and procedures on communication standards

- AK0102 Confidentiality of information
- AK0103 Concise communication standards
- AK0104 Standard meeting procedures
- AK0105 Minute and note taking skills

Internal Assessment Criteria

- IAC0101 Explain processes and procedures to be implemented that would assist in the efficiency of general office administration
- IAC0102 Make a presentation on a topic given
- IAC0103 Write business letters using various case studies
- IAC0104 Role-play meeting procedures and record the minutes according to criteria given
- IAC0105 Process and file all source documents according to processes and procedures
- IAC0106 Create an asset register as per given case study
- IAC0107 Update an asset register according organisational standards
- IAC0108 Explain the process of ordering office supplies
- IAC0109 Prepare diary entry for scheduled meetings and appointments
- IAC0110 Prepare a contact list of stakeholders as per given case study
- IAC0111 Record distributed documents for tracking purposes according to organizational policy
- IAC0112 Write correspondence documents as per given specifications
- IAC0113 Make travel arrangements as per given instructions for the unit according to organizational standards
- IAC0114 Role-play how to give general support to visitors as per given scenario
- IAC0115 Prepare reports according to given templates
- IAC0116 Role-play meeting procedures and record the minutes according to criteria given
- IAC0117 Develop a file system according to given organizational documents
- IAC0118 Demonstrate how to answer and direct phone calls in an organization
- IAC0119 Demonstrate and explain how to operate a range of office machines such as photocopiers, computers and faxes
- IAC0119 Demonstrate and explain how to operate a range of office machines such as photocopiers, computers and faxes

7.2.2. PM-07-PS02: Interact with clients via telephone or in branch

Scope of Practical Skill

Given an organisational policy and procedures on customer service the learner needs to be able to interpret and apply customer service through role-play and other methods, the learner must be able to:

- PA0201 Access, interpret, apply and monitor customer service standards in the workplace in accordance with organisational standards, policies and procedures
- PA0202 Use appropriate interpersonal skills to accurately identify and clarify customer needs and expectations
- PA0203 Use effective communication to inform customers about available choices for meeting their needs and assist in the selection of preferred options
- PA0204 Provide prompt service to customers to meet identified needs in accordance with organisational requirements
- PA0205 Sensitively and courteously handle customer complaints in accordance with organisational requirements
- PA0206 Identify and use available opportunities to promote and enhance services and products to customers
- PA0207 Refer customer requests for information, advice, products or services that fall outside the unit/division to the correct division/unit for resolution
- PA0208 Respond to customer queries or complaints in a courteous and timely manner using the required protocols and processes of the institution

Applied Knowledge

- AK0201 Organisational policy and procedures for customer service
- AK0202 Communication skills
- AK0203 Problem solving techniques
- AK0204 Telephone etiquette
- AK0205 Customer service standards
- AK0206 Code of conduct
- AK0207 Protocol department and etiquette

Internal Assessment Criteria

- IAC0201 Apply customer service standards to given case studies
- IAC0202 Compile a report on all case studies dealt with

7.2.3. PM-07-PS03: Interact with internal and external stakeholders

Scope of Practical Skill

Given an organisational policy and procedures on customer service the learner needs to be able to interpret and apply customer service through role-play and other methods, the learner must be able to:

- PA0301 Access, interpret, apply and monitor customer service standards in the workplace in accordance with organisational standards, policies and procedures

- PA0302 Use appropriate interpersonal skills to accurately identify and clarify customer needs and expectations
- PA0303 Use effective communication to inform customers about available choices for meeting their needs and assist in the selection of preferred options
- PA0304 Provide prompt service to customers to meet identified needs in accordance with organisational requirements
- PA0305 Sensitively and courteously handle customer complaints in accordance with organisational requirements
- PA0306 Identify and use available opportunities to promote and enhance services and products to customers

Applied Knowledge

- AK0301 Organisational policy and procedures for customer service
- AK0302 Communication and interpersonal skills
- AK0303 Problem solving techniques
- AK0304 Code of conduct
- AK0305 Protocol department and etiquette

Internal Assessment Criteria

- IAC0301 Apply customer service standards to given case studies
- IAC0302 Compile a report on all case studies dealt with

7.2.4. PM-07-PS04: Manage the operational customer interaction systems

Scope of Practical Skill

Given a simulated learning environment, the learner must be able to:

- PA0401 Explain the various customer interaction systems, including the support processes required for the effective implementation and achievement of operational customer interaction systems
- PA0402 Identify and explain various inbound and outbound customer interaction systems
- PA0403 Document and track interaction routing using a flow diagram
- PA0404 List the different customer interaction types, and determine capabilities and capacity criteria
- PA0405 Align the customer interaction processes with operational and support processes to ensure that business objectives, customer requirements and performance metrics are met

Applied Knowledge

- AK0401 Working knowledge of customer interaction systems, including telephony and multi-media
- AK0402 Technical knowledge of customer interaction systems, including telephony and multi-media
- AK0403 Evaluation and monitoring of processes

- AK0404 The principles of risk management and the impact of non-adherence on the operational
- AK0405 Problem solving and decision making methods

Internal Assessment Criteria

- IAC0401 Comprehensive knowledge and understanding of customer interaction systems, including telephony and multi-media is demonstrated

7.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Learning resources approved by the AQP
- Assessment documentation, instruments and standards approved by the AQP
- Equipped learning facilitation venue, meeting health and safety standards
- Access for people with disabilities
- Has Access to:
 - Structured examples and scenarios
 - Internet facilities, required literature and research facilities
 - Distance and E-learning

Human Resource Requirements:

- Lecturer/learner ratio of 1:30 (Max)
- Lecturers/facilitators need to be qualified at a Level 6 or higher in the relevant field or have at least 3 years relevant experience in Communication and customer services
- It would be advantageous if lecturers are registered with a relevant Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct
- Approved and accredited by the relevant AQP as per QCTO requirements

7.4 Exemptions

- None

8. 334302001-PM-08, Organise meetings, NQF Level 5, Credits 10

8.1 Purpose of the Practical Skill Modules

The focus of the learning in this module is on providing the learner an opportunity to apply the skills and knowledge required to organise meetings including making arrangements, liaising with participants, and developing and distributing meeting related documentation. It applies to individuals employed in a range of work environments who are required to organise a variety of meetings. They may provide administrative support within an enterprise, or have responsibility for these tasks in the context of a particular team, work group or project.

The learner will be required to:

- PM-08-PS01: Make meeting arrangements
- PM-08-PS02: Prepare and distribute documentation for meetings
- PM-08-PS03: Record and produce minutes of meeting

8.2 Guidelines for Practical Skills

8.2.1. PM-08-PS01: Make meeting arrangements

Scope of Practical Skill

Given tasks must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to office equipment and resources, the learner must be able to:

- PA0101 Identify the type of meeting being organised and its purpose
- PA0102 Identify and comply with any legal or ethical requirements
- PA0103 Identify requirements of the meeting and its participants
- PA0104 Make meeting arrangements in accordance with meeting and participants requirements
- PA0105 Advise participants of meeting details

Applied Knowledge

- AK0101 Culturally appropriate communication techniques
- AK0102 Relevant formats for agendas and minutes
- AK0103 Key provisions of relevant legislation
- AK0104 Organisational procedures relevant to the task

Internal Assessment Criteria

- IAC0101 Type of meeting being organised and its purpose is identified
- IAC0102 Legal or ethical requirements are identified and complied with
- IAC0103 Meeting requirements and its participants are identified
- IAC0104 Meeting arrangements are made in accordance with meeting and participants requirements
- IAC0105 Meeting details are communicated to participants

8.2.2. PM-08-PS02: Prepare and distribute documentation for meetings

Scope of Practical Skill

Given tasks must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to office equipment and resources, the learner must be able to:

- PA0201 Prepare notice of meeting, agenda and meeting papers in accordance with meeting requirements
- PA0202 Check documentation for accuracy and correct any errors using appropriate tools
- PA0203 Distribute documentation to participants within designated timelines
- PA0204 Prepare spare sets of documents

Applied Knowledge

- AK0201 Culturally appropriate communication techniques
- AK0202 Relevant formats for agendas and minutes
- AK0203 Key provisions of relevant legislation
- AK0204 Organisational procedures relevant to the task

Internal Assessment Criteria

- IAC0201 Notice of meeting, agenda and meeting papers are prepared in accordance with meeting requirements
- IAC0202 Documentation is checked for accuracy and any errors corrected using appropriate tools
- IAC0203 Documentation is distributed to participants within designated timelines
- IAC0204 Spare sets of documents are prepared

8.2.3. PM-08-PS03: Record and produce minutes of meeting

Scope of Practical Skill

Given tasks must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the general administration field of work and include access to office equipment and resources, the learner must be able to:

- PA0301 Take notes with the required speed and accuracy to ensure an accurate record of the meeting
- PA0302 Produce minutes that reflect a true and accurate account of the meeting
- PA0303 Check minutes for accuracy and submit for approval by the nominated person
- PA0304 Dispatch copies of minutes within designated timelines

Applied Knowledge

- AK0301 Culturally appropriate communication techniques
- AK0302 Relevant formats for agendas and minutes
- AK0303 Key provisions of relevant legislation
- AK0304 Organisational procedures relevant to the task

Internal Assessment Criteria

- IAC0301 Notes are taken with the required speed and accuracy to ensure an accurate record of the meeting
- IAC0302 Minutes are produced that reflect a true and accurate account of the meeting
- IAC0303 Minutes are checked for accuracy and submitted for approval by the nominated person
- IAC0304 Copies of minutes are dispatched within designated timelines

8.3 Provider Programme Accreditation Criteria

Physical Requirements:

- Learning resources approved by the AQP
- Assessment documentation, instruments and standards approved by the AQP
- Equipped learning facilitation venue, meeting health and safety standards
- Access for people with disabilities
- Has Access to:
 - Structured examples and scenarios
 - Internet facilities, required literature and research facilities
 - Distance and E-learning

Human Resource Requirements:

- Lecturer/learner ratio of 1:30 (Max)
- Lecturers/facilitators need to be qualified at a Level 6 or higher in the relevant field or have at least 3 years relevant experience in Office Management
- It would be advantageous if lecturers are registered with a relevant Professional Body for Continuous Professional Development purposes
- Assessor and Moderator have professional recognition in the field of expertise and approved by the relevant AQP

Legal Requirements:

- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct

- Approved and accredited by the relevant AQP as per QCTO requirements

8.4 Exemptions

- None

SECTION 3C: WORK EXPERIENCE MODULE SPECIFICATIONS

List of Work Experience Module Specifications

- 334302001-WM-01, Perform administrative and meeting support functions to support management, NQF Level 5, Credits 12
- 334302001-WM-02, Apply ready for work standards to everyday work activities, NQF Level 5, Credits 25
- 334302001-WM-03, Handle customer and client's queries and liaison in an office, NQF Level 5, Credits 8
- 334302001-WM-, Assist in planning and coordinating at least two special events/conferences, NQF Level 5, Credits 20
- 334302001-WM-05, Procure and allocate resources, NQF Level 5, Credits 15
- 334302001-WM-06, Manage a paperless office, NQF Level 5, Credits 20
- 334302001-WM-07, Apply supervisory skills to coordinate and direct clerical staff activities, NQF Level 5, Credits 20
- 334302001-WM-08, Prepare a trip itinerary, NQF Level 4, Credits 15

1. 334302001-WM-01, Perform administrative and meeting support functions to support management, NQF Level 5, Credits 12

1.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to gain exposure to the complexities of planning and coordinating processes for administrative tasks under authentic working conditions. This includes exposure to the complexities of dealing with different workplace demands, pressures of work and client needs. The focus of this module is on the development of confidence in running an executive office as well as planning different meetings and to complete all necessary documentation related to these tasks. This is done under supervision.

The learner will be required to:

- WM-01-WE01: Perform day-to-day administrative tasks such as maintaining information files and processing paperwork
- WM-01-WE02: Organise at least three different kinds of meetings
- WM-01-WE03: Apply effective and accurate information processing skills to create professional documentation

1.2 Guidelines for Work Experiences

1.2.1. WM-01-WE01: Perform day-to-day administrative tasks such as maintaining information files and processing paperwork

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0101 Set up and manage paper or electronic filing systems, recording information, updating paperwork, or maintaining documents, such as attendance records, correspondence, or other material
- WA0102 Operate office equipment, such as fax machines, copiers, or phone systems and arrange for repairs when equipment malfunctions
- WA0103 Maintain scheduling and event calendars
- WA0104 Complete forms in accordance with company procedures
- WA0105 Schedule and confirm appointments for clients, customers, or supervisors
- WA0106 Make copies of correspondence or other printed material
- WA0107 Locate and attach appropriate files to incoming correspondence requiring replies
- WA0108 Open, read, route, and distribute incoming mail or other materials and answer routine letters
- WA0109 Review work done by others to check for correct spelling and grammar, ensure that company format policies are followed, and recommend revisions
- WA0110 Manage projects or contribute to committee or team work
- WA0111 Mail newsletters, promotional material, or other information
- WA0112 Order and dispense supplies

- WA0113 Establish work procedures or schedules and keep track of the daily work of clerical staff
- WA0114 Prepare and mail checks
- WA0115 Distribute incoming mail

Supporting Evidence

- SE0101 Editing (accuracy, spelling, format)
- SE0102 Filing
- SE0103 Supplies/asset register
- SE0104 Procedures developed
- SE0105 Schedules
- SE0106 Training packs
- SE0107 Electronic diary

1.2.2. WM-01-WE02: Organise at least three different kinds of meetings

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0201 Prepare meeting packs, agendas, and audio visual aids for presentations
- WA0202 Attend meetings take notes or minutes and participate where required
- WA0203 Apply appropriate meeting protocol for the taking of decisions (quorums, proxy votes, motions, resolutions, decisions and actions)
- WA0204 Record information from meetings or other formal proceedings
- WA0205 Compose, type, and distribute meeting notes, routine correspondence, or reports, such as presentations or expense, statistical, or monthly reports
- WA0206 Proof read and edit documentation required for internal use and meetings/appointments prior to further distribution to supervisor/executive

Supporting Evidence

- SE0201 Attendance registers
- SE0202 Minutes of different meetings
- SE0203 Decision and Action lists
- SE0204 Editing (accuracy, spelling, format)
- SE0205 Procurement of catering (dietary requirements applied)
- SE0206 Meeting packs

1.2.3. WM-01-WE03: Apply effective and accurate information processing skills to create professional documentation

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0301 Accurately produce and format office documentation including but not limited to business letters/concise, meeting documentation and reports
- WA0302 Check documentation for accuracy and correct any errors using appropriate tools
- WA0303 Prepare invoices, reports, memos, letters, financial statements, and other documents, using word processing, spreadsheet, database, or presentation software
- WA0304 Prepare responses to correspondence containing routine inquiries
- WA0305 Coordinate and direct office services, such as records, departmental finances, budget preparation, personnel issues, and housekeeping, to aid executives

Supporting Evidence

- SE0301 Business letters/concise, meeting documentation, reports and advertising, invoices, reports, memos, letters, financial statements
- SE0302 Editing (accuracy, spelling, format)
- SE0303 Responses to queries
- SE0304 Records of office services

1.3 Contextualised Workplace Knowledge

1 Relevant understanding of the organisation processes and procedures

2 The nature of the organisation code of conduct standards

3 Organisational procedures for internal and external communication and liaison with internal and external clients

4 Organisational procedures for employee wellness

5 Disability regulations

1.4 Criteria for Workplace Approval

Physical Requirements:

- Computer, printer, fax, telephone and copier
- In and out trays
- Storing system for files and other records
- Operating budget for the finance unit

Human Resource Requirements:

- Supervisor or mentor

- Qualified with 3 years of experience in a relevant unit
- Supervisor/learner ratios 1:3

Legal Requirements:

- Legally compliant venue, (i.e. fire protection devices, OHS and other legislation)
- Quality Management System which includes all relevant policies and procedures
- Code of Conduct
- Professional registration with relevant body

1.5 Additional Assignments to be Assessed Externally

None

2. 334302001-WM-02, Apply ready for work standards to everyday work activities, NQF Level 5, Credits 25

2.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to gain exposure to the complexities of dealing with different workplace demands, pressures of work and client needs under authentic working conditions. The focus of this module is on the development of confidence in execution of duties in a manner fit for purpose.

The learner will be required to:

- WM-02-WE01: Apply ethics and values of the company to everyday business dealings
- WM-02-WE02: Apply appropriate personal and interpersonal skills to enhance smooth relations with internal and external stakeholders and promoting professional image of the organisation
- WM-02-WE03: Apply time management skills to all supportive tasks for the unit/division to be able to meet operational targets
- WM-02-WE04: Inform colleagues on stress management techniques through a presentation
- WM-02-WE05: Identify and advise on barriers and discriminatory practices re disability

2.2 Guidelines for Work Experiences

2.2.1. WM-02-WE01: Apply ethics and values of the company to everyday business dealings

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0101 Sign the organisations Code of Conduct
- WA0102 Apply the values and mission statement of the company to everyday working conditions
- WA0103 Conduct ethical conduct and values towards customers and colleagues

Supporting Evidence

- SE0101 Signed Code of conduct
- SE0102 Performance evaluation
- SE0103 Feedback Reports
- SE0104 Emails and memos

2.2.2. WM-02-WE02: Apply appropriate personal and interpersonal skills to enhance smooth relations with internal and external stakeholders and promoting professional image of the organisation

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0201 Compile a guideline document on appropriate interpersonal skills to accurately deal with conflicts, confrontations and disagreements with internal and external stakeholders and circulate to colleagues

- WA0202 Identify acceptable and non-acceptable professional image displayed by different stakeholders in a work environment and suggest remedial changes that will enhance the professional image appropriate/applicable to the organisation
- WA0203 Compile a portfolio on a specific country on applicable customs and protocol and present this to your colleagues through a presentation on protocol procedures regarding greetings, personal space, etiquette and specific customs, as part of the preparation for receiving international guest/s

Supporting Evidence

- SE0201 Guideline document
- SE0202 Feedback Reports
- SE0203 Portfolio of evidence
- SE0204 Emails and memos

2.2.3. WM-02-WE03: Apply time management skills to all supportive tasks for the unit/division to be able to meet operational targets

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0301 Obtain from the supervisor the organisational guidelines with acceptable time lines for each activity against a standard norm
- WA0302 Identify weaknesses in current work processes in terms of poor time management
- WA0303 Identify the top time wasters that impact on the organisation's productivity with a view to minimizing their negative influence
- WA0304 Plan the work and workflow to accomplish the set targets
- WA0305 Identify the key activities required to complete a specific project and all tasks and work procedures are analysed and assigned to a specific time frame
- WA0306 Analyse work processes and discover new ways to complete them efficiently
- WA0307 Report on the targets and deviations
- WA0308 Progress with work plans is monitored on an on-going basis and amendments are made where necessary
- WA0309 Suggest ways of improving on productivity

Supporting Evidence

- SE0301 Report on progress and achievements
- SE0302 Feedback reports
- SE0303 Schedules
- SE0304 Action plans
- SE0305 Email, faxes and mail responses

2.2.4. WM-02-WE04: Inform colleagues on stress management techniques through a presentation

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0401 Identify two potential internal sources and two external sources of stress
- WA0402 Prepare a presentation to colleagues on the symptoms of stress and the consequences of stress overload, and suggest ways in reducing unwanted stress
- WA0403 Range evidence is required for three physical, three emotional, and three behavioural symptoms

Supporting Evidence

- SE0401 Presentation on stress management
- SE0402 Email, faxes and mail responses

2.2.5. WM-02-WE05: Identify and advise on barriers and discriminatory practices re disability

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0501 Identify disability barriers in the workplace
- WA0502 Suggest possible remedial actions to improve disability access in the workplace

Supporting Evidence

- SE0501 Disability access improvement suggestions

2.3 Contextualised Workplace Knowledge

1 Relevant understanding of the organisation processes and procedures

2 The nature of the organisation code of conduct standards

3 Organisational procedures for internal and external communication and liaison with internal and external clients

4 Organisational procedures for employee wellness

5 Disability regulations

2.4 Criteria for Workplace Approval

Physical Requirements:

- Computer, printer, fax, telephone and copier
- In and out trays

- Storing system for files and other records
- Operating budget for the finance unit

Human Resource Requirements:

- Supervisor or mentor
- Qualified with 3 years of experience in a relevant unit
- Supervisor/learner ratios 1:3

Legal Requirements:

- Legally compliant venue, (i.e. fire protection devices, OHS and other legislation)
- Quality Management System which includes all relevant policies and procedures
- Code of Conduct
- Professional registration with relevant body

2.5 Additional Assignments to be Assessed Externally

None

3. 334302001-WM-03, Handle customer and clients queries and liaison in an office, NQF Level 5, Credits 8

3.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to engage with stakeholders, handle customer and clients queries and liaison, promote products and services, and ensure quality service standards.

The learner will be required to:

- WM-03-WE01: Handle customer and clients queries and liaison
- WM-03-WE02: Work in an office conveying specialised knowledge in response to customer queries
- WM-03-WE03: Maintain a comfortable environment for customers and staff

3.2 Guidelines for Work Experiences

3.2.1. WM-03-WE01: Handle customer and clients queries and liaison

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0101 Liaise with clients, suppliers and other staff
- WA0102 Meet and greet visitors at all levels of seniority
- WA0103 Screen phone calls, enquiries and requests, and handle them when appropriate
- WA0104 Answer to client queries
- WA0105 Write feedback reports to clients and management on queries received

Supporting Evidence

- SE0101 Relevant documentation
- SE0102 Feedback reports
- SE0103 Customer feedback
- SE0104 Email, faxes and mail responses

3.2.2. WM-03-WE02: Work in an office conveying specialised knowledge in response to customer queries

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0201 Manage the office for a period of 5 hours per week for a period of 4 months
- WA0202 Compile a weekly list of frequently asked questions and the answers thereof for a period of 3 months
- WA0203 Reference information using the relevant sources during above period

- WA0204 Record customer requests on a system (book, electronic) and follow through to completion

Supporting Evidence

- SE0201 Timesheets
- SE0202 Number of clients helped
- SE0203 List of frequently asked questions and the answers thereof
- SE0204 Customer request book

3.2.3. WM-03-WE03: Maintain a comfortable environment for customers and staff

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0301 Maintain the service area of the office and ensure it is conducive for staff and customers
- WA0302 Display/reception areas and notice boards are kept updated and attractive on a daily basis
- WA0303 Keep furniture out of the way and not causing obstructions to users or staff

Supporting Evidence

- SE0301 Photos of the office

3.3 Contextualised Workplace Knowledge

1. Legislation, standards, policies, and procedures followed in the company relevant to customer service and liaison
2. Relevant occupational health and safety requirements applicable in the work/company/organization and its processes
3. Organization culture and typical customer profile
4. Company's service level agreements and policies
5. Company's code of conduct
6. Organisational procedures for internal and external communication and liaison with internal and external clients

3.4 Criteria for Workplace Approval

Physical Requirements:

- Fully operational office
- Fully established reception desk
- Computer, printer, fax, telephone and copier
- In and out trays
- Storing system for files and other records
- Operating budget for the office

Human Resource Requirements:

- Supervisor or mentor
- Qualified with 3 years of experience in Office Management field
- Supervisor/learner ratios 1:3

Legal Requirements:

- Legally compliant venue, (i.e. fire protection devices, OHS and other legislation)
- Quality Management System which includes all relevant policies and procedures
- Code of Conduct
- Professional registration with relevant body

3.5 Additional Assignments to be Assessed Externally

None

4. 334302001-WM-04, Assist in planning and coordinating at least two special events/conferences, NQF Level 5, Credits 20

4.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to gain exposure to the complexities of planning and coordinating special events, conferences and workshops under authentic working conditions. This includes exposure to the complexities of assisting with different workplace demands, pressures of work and client needs. The focus of this module is on the development of confidence in supporting the planning and coordinating of an event and or conference. This is achieved by exposing the learner to the application of knowledge and practical skills gained during planning and coordination of an event and or conference processes under close supervision.

The learner will be required to:

- WM-04-WE01: Assist with planning at least two conferences and or events
- WM-04-WE02: Organise logistics for conference and or event
- WM-04-WE03: Follow up on conference and or event proceedings

4.2 Guidelines for Work Experiences

4.2.1. WM-04-WE01: Assist with planning at least two conferences and or events

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0101 Confirm purpose, required outcomes and style of conference/events with convener/s
- WA0102 Procure the required inventory of backdrops, computers, projectors and other materials
- WA0103 Confirm conference facilities requirements, budget, and preparation timeline with conference convener/s
- WA0104 Prepare a call for papers/presentations in accordance with conference purpose and style
- WA0105 Draft conference/event program in line with stated purpose, and balance choice of program elements to allow outcomes to be achieved
- WA0106 Invite speakers/presenters in accordance with conference/event brief
- WA0107 Plan conference/event administration requirements and tasks, processes and resources to ensure efficient management of conference data and resources

Supporting Evidence

- SE0101 Completed checklists of relevant organisational policies and procedures for planning and managing conferences
- SE0102 Budget report for project
- SE0103 Milestone report on activities and
- SE0104 Portfolio of reference material related to conference venues, transport, accommodation and catering
- SE0105 Completed conference documentation

- SE0106 List of relevant contact persons, including speakers, clients and management

4.2.2. WM-04-WE02: Organise logistics for conference and or event

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0201 Support the coordination of requirements for the events(Range: includes but not limited to venues, caterers, musicians, sounds and speakers, photographers, equipment hires, florist)
- WA0202 Assist with confirming layouts and decorations at the event location based on the requirements of the customer and the event/conference type
- WA0203 Ensure the seating arrangements and the number of seats is layed out according the clients brief
- WA0204 Record acceptances, receipt fees and confirm participants within designated timelines
- WA0205 Confirm program details and assist with preparing conference papers/event presentations in accordance with speakers' requirements and conference timeline
- WA0206 Dispatch pre conference/event information to participants within designated timelines
- WA0207 Register participants in accordance with planned registration procedures
- WA0208 Communicate to participants any late changes to program
- WA0209 Manage administration requirements during conference/event in accordance with conference plan/schedule

Supporting Evidence

- SE0201 Completed checklists of relevant organisational policies and procedures for planning
- SE0202 Electronic tools used in managing confirmations and fees payments
- SE0203 Presentation packs
- SE0204 Conference/event programme and related documentation
- SE0205 Completed conference/event documentation
- SE0206 List of relevant contact persons, including speakers, clients and management for dispatch purposes

4.2.3. WM-04-WE03: Follow up on conference and or event proceedings

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0301 Record, and/or follow up conference/event outcomes in accordance with organisational requirements
- WA0302 Post-conference correspondence is prepared and dispatched within designated timelines

- WA0503 Collect receipts to assist with processing payments in accordance with organisational procedures and audit requirements

Supporting Evidence

- SE0501 Electronic tools used in managing receipts
- SE0502 Invoices and receipts
- SE0503 Budget report for project for audit purposes
- SE0504 Presentation packs to be distributed to relevant stakeholders
- SE0505 Completed conference/event documentation and dispatch orders
- SE0506 List of relevant contact persons, including speakers, clients and management dispatched to

4.3 Contextualised Workplace Knowledge

1 Organisational policies, procedures and work instructions

2 Standard confirmation and RSVP templates

3 Organisational conference paper/presentation format

4 Organisational OHS regulations

4.4 Criteria for Workplace Approval

Physical Requirements:

- Tools, equipment and resources
- Structured examples and scenarios
- Internet facilities, required literature and research facilities
- Exposure to all aspects of occupational tasks
- Tools and equipment to conduct occupational tasks

Human Resource Requirements:

- Learner to be supervised by a qualified/experienced conference and or events planner

Legal Requirements:

- Learner to be supervised by a qualified/experienced conference and or events planner
- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct

4.5 Additional Assignments to be Assessed Externally

None

5. 334302001-WM-05, Procure and allocate resources, NQF Level 5, Credits 15

5.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to gain exposure to compiling information to draw up purchase orders for procurement of materials and services. This is done under supervision.

The learner will be required to:

- WM-05-WE01: Procure office materials, supplies and or equipment
- WM-05-WE02: Allocate resources
- WM-05-WE03: Manage assets and stocktaking

5.2 Guidelines for Work Experiences

5.2.1. WM-05-WE01: Procure office materials, supplies and or equipment

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0101 Check the availability of budget prior to procurement of goods or services
- WA0102 Source quotations for the procurement of goods and services for the unit
- WA0103 Complete forms in accordance with company procedures
- WA0104 Order materials, supplies, or equipment
- WA0105 Maintain a database of service providers
- WA0106 Facilitate and track quotes
- WA0107 Sign receipt for goods and/or cash received
- WA0108 Assist in basic procurement and requisition
- WA0109 Contact clients to obtain or relay information

Supporting Evidence

- SE0101 Budgets
- SE0102 Quotations
- SE0103 Requisition forms
- SE0104 Purchase orders
- SE0105 List of service providers
- SE0106 Receipts and invoices
- SE0107 Proof of communication with clients

5.2.2. WM-05-WE02: Allocate resources

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0201 Apply the organisational policies and procedures in relation to resource management
- WA0202 Manage petty cash system
- WA0203 Record income and expenditure of the unit
- WA0204 Disburse money for petty cash transactions
- WA0207 Respond to queries and enquiries
- WA0208 Manage the flow of procurement and submission documents according to the company's policies and procedures
- WA0209 Report maintenance or equipment problems to appropriate personnel
- WA0210 Select resources needed to accomplish tasks
- WA0211 Distribute materials and supplies to employees or customers

Supporting Evidence

- SE0201 Resource management policies and procedures
- SE0202 Proof of response to queries and enquiries
- SE0203 Decision and Action lists
- SE0204 Procurement and submission documentation
- SE0205 Resource allocation register

5.2.3. WM-05-WE03: Manage assets and stocktaking

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0301 Manage the assets of the unit according to an organizational policy
- WA0302 Do inventory and stock control
- WA0303 Maintain asset register of the relevant department
- WA0304 Dispose of assets according asset policy of the organisation
- WA0305 Manage the consumables of the unit by controlling the consumable stock register

Supporting Evidence

- SE0301 Asset register
- SE0302 Consumable stock register
- SE0303 Completed asset disposal forms

- SE0304 Inventory and stock control checklist

5.3 Contextualised Workplace Knowledge

1 Relevant understanding of the organisation procurement processes and procedures

2 Legislation, standards, policies, and procedures followed in the company relevant to customer service and liaison

3 Organisational resource management regulations

4 Relevant occupational health and safety requirements applicable in the work/company/organization and its processes

5.4 Criteria for Workplace Approval

Physical Requirements:

- Tools, equipment and resources
- Structured examples and scenarios
- Internet facilities, required literature and research facilities
- Exposure to all aspects of occupational tasks
- Tools and equipment to conduct occupational tasks

Human Resource Requirements:

- Learner to be supervised by a qualified/experienced supply chain or relevant personnel

Legal Requirements:

- Learner to be supervised by a qualified/experienced supply chain or relevant personnel
- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct

5.5 Additional Assignments to be Assessed Externally

None

6. 334302001-WM-06, Manage a paperless office, NQF Level 5, Credits 20

6.1 Purpose of the Work Experience Modules

The focus of the work experience is on providing the learner an opportunity to work in an environment in which the use of paper is reduced or eliminated and e-filing encouraged. The learner will gain exposure to converting documents and other papers into digital format. The paperless office can be defined as an electronic document management environment that provides an alternative to the workflow and storage issues associated with paper files. This will enable the learner to increase productivity, save space, make documentation and information sharing easier, secure personal information and help the working environment go green.

The learner will be required to:

- WM-06-WE01: Plan the filing structure and storage of documents
- WM-06-WE02: Apply security features to e-filing of documentation
- WM-06-WE03: Utilise an e-diary for daily planning of work

6.2 Guidelines for Work Experiences

6.2.1. WM-06-WE01: Plan the filing structure and storage of documents

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0101 Hold a brainstorming session with various members in your organisation to develop a drawer and folder type structure for your entire organisation
- WA0102 Set up a document management system consisting of computer software that allows you to perform simple tasks such as filing, indexing and document retrieval to more complex tasks such as workflow.
- WA0103 Train staff members who will be responsible for maintaining the file structures
- WA0104 identify and train other staff members on the use of the file structures and who will scan documents will
- WA0105 Identify staff to scan documents for digital storage
- WA0106 Compile a list of guidelines for e-filing of documentation and correspondence

Supporting Evidence

- SE0101 E- Filing guidelines
- SE0102 Checklist for e-filing

6.2.2. WM-06-WE02: Apply security features to e-filing of documentation

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0101 Identify documents that need to be accessed more frequently and quickly

- WA0102 Provide confidentiality by applying security measures against unauthorized entry such as routers, firewalls, antivirus software and passwords
- WA0103 Apply file property settings to ensure that documents stored electronically cannot be inadvertently modified or destroyed.
- WA0104 Send, receive, file and archive documents according to company processes and procedures
- WA0105 File documents according to processes and procedures

Supporting Evidence

- SE0201 E-Filing processes and procedures followed
- SE0202 E-filed documentation
- SE0203 Security guidelines for documentation

6.2.3. WM-06-WE03: Utilise an e-diary for daily planning of work

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0301 Keep track of appointments in an electronic form
- WA0302 Schedule and confirm appointments for clients, customers, or supervisors using an electronic diary
- WA0303 Share diaries between other relevant diary users to synchronise activities and appointments
- WA0304 Book meetings using an electronic diary
- WA0305 Utilise the electronic diary to book and control the use of meeting venues and boardrooms.

Supporting Evidence

- SE0301 Copy of calendar invite
- SE0302 Proof of appointments scheduled using an electronic diary

6.3 Contextualised Workplace Knowledge

1 Relevant understanding of the organisation processes and procedures in document management

2 Legislation, standards, policies, and procedures followed in the company relevant to document management and electronic filing

3 Security features of documentation

6.4 Criteria for Workplace Approval

Physical Requirements:

- Tools, equipment and resources
- Structured examples and scenarios
- Internet facilities, required literature and research facilities
- Exposure to all aspects of occupational tasks
- Tools and equipment to conduct occupational tasks

Human Resource Requirements:

- Learner to be supervised by a qualified/experienced supply chain personnel

Legal Requirements:

- Learner to be supervised by a qualified/experienced supply chain personnel
- Legally compliant venue, (i.e. Fire protection services, OHS and other legislation)
- Code of Conduct

6.5 Additional Assignments to be Assessed Externally

None

7. 334302001-WM-07, Apply supervisory skills to coordinate and direct clerical staff activities, NQF Level 5, Credits 20

7.1 Purpose of the Work Experience Modules:

The focus of the work experience is on providing the learner an opportunity to oversee the activities of clerical staff. These includes duties such as managing and motivating staff, assigning work, applying Human Resource related issues and supervise safe working conditions.

The learner will be required to:

- WM-07-WE01: Apply supervisory skills to coordinate and direct clerical staff activities
- WM-07-WE02: Apply basic knowledge of Human resource related legislative, governance, policies and procedures
- WM-07-WE03: Apply OHS policies and procedures

7.2 Guidelines for Work Experiences

7.2.1. WM-07-WE01: Apply supervisory skills to coordinate and direct clerical staff activities

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0101 Allocate work activities to clerical staff according to set standards of the organization
- WA0102 Provide clarity of job assignments and assist clerical staff to increase their skill level
- WA0103 Provide advice and on-going feedback about the employee's performance
- WA0104 Arrange, coordinate and provide training of clerical staff for continuous professional development

Supporting Evidence

- SE0101 Work schedule
- SE0102 Performance agreements
- SE0103 E-mails
- SE0104 Guideline documents
- SE0105 Memorandums to staff
- SE0106 Scheduled Sectional/Staff Meetings
- SE0107 Notes from briefing sessions

7.2.2. WM-07-WE02: Apply basic knowledge of Human resource related legislative, governance, policies and procedures

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0201 Check the leave forms and attendance/absenteeism registers on a daily basis.

- WA0202 Identify the types of leave and match the leave forms with the registers.
- WA0203 Send relevant information to the HR office as per organizational policies.
- WA0204 Answer basic questions regarding leave and seek information regarding policies.
- WA0205 Compile a report detailing queries regarding the employee handbook or orientation manual and update manager
- WA0206 Observe and record any violations of Labour Act according to employment act
- WA0207 Establish work procedures or schedules and keep track of the daily work of clerical staff
- WA0208 Supervise other clerical staff and provide training and orientation to new staff.
- WA0209 Supervise clerical or administrative personnel.
- WA0210 Train personnel on latest development and processes related to office administration.
- WA0211 Assist in compiling HRM and HRD documents
- WA0212 Provide general support regarding leave and other HR activities

Supporting Evidence

- SE0201 Checked copies of relevant leave forms
- SE0202 Updated attendance/absenteeism register
- SE0203 Employee handbook and contracts
- SE0204 Orientation manual
- SE0205 Checklist for basic Compliance :
 - BCEA
 - OHS Act

7.2.3. WM-07-WE03: Apply OHS policies and procedures to ensure safe working conditions

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0301 Create a checklist/guide for health and emergency procedures for office staff
- WA0302 Comply with local, and company health and safety regulations
- WA0303 Demonstrate knowledge of facility guidelines to ensure physical safety of customers, attendees, employees, and organizers including emergency shutdown procedures
- WA0304 Be aware of evacuation routes, fire extinguisher location and use, shut-down procedures and safety manuals
- WA0305 Explain the importance of disseminating information to customers addressing potential safety hazards and security issues, e.g., display safety and security information and materials in a public area
- WA0306 Maintain a sanitary and clutter-free work environment

- WA0307 Use equipment and tools safely
- WA0308 Know to whom one should report any safety hazards or suspicious people or activity
- WA0309 Create a resource base to manage emergency situations

Supporting Evidence

- SE0301 Checklist for basic Compliance:
 - BCEA
 - OHS Act
- SE0302 Signs for safety procedures in relevant places
- SE0303 Evacuation plans

7.3 Contextualised Workplace Knowledge

1. Organisational processes and procedures for supervising, implementing and maintaining processes and procedures at the area of responsibility
2. Organisation processes and procedures for the completion of administration at the area of responsibility
3. Labour related legislation impacting on area of responsibility
4. Organisation processes and procedures for the implementation of OHS legislation impacting on area of responsibility

7.4 Criteria for Workplace Approval

Physical Requirements:

- Computer, printer, fax, telephone and copier
- In and out trays
- Storing system for files and other records
- Operating budget

Human Resource Requirements:

- Supervisor or mentor
- Qualified with 3 years of Supervision or Management experience in a unit
- Supervisor/learner ratios 1:3

Legal Requirements:

- Legally compliant venue, (i.e. fire protection devices, OHS and other legislation)
- Quality Management System which includes all relevant policies and procedures
- Code of Conduct
- Professional registration with relevant body

7.5 Additional Assignments to be Assessed Externally

None

8. 334302001-WM-08, Prepare a trip itinerary, NQF Level 4, Credits 15

8.1 Purpose of the Work Experience Modules:

The focus of the work experience is on providing the learner an opportunity to gain exposure to preparing an appropriate itinerary. It requires the finalization of the trip requirements, processing the necessary documentation and distributing the itinerary to the relevant person/s.

The learner will be required to:

- WM-08-WE01: Finalise the exact requirements for the trip
- WM-08-WE02: Apply basic knowledge of completing necessary documentation
- WM-08-WE03: Distribute the prepared itinerary

8.2 Guidelines for Work Experiences

8.2.1. WM-08-WE01: Finalise the exact requirements for the trip

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0101 Confirm the budget for the trip
- WA0102 Determine preferred modes of travel
- WA0103 Source Accommodation venues
- WA0104 Source meeting venues
- WA0105 Confirm selected venues
- WA0106 Confirm selected transportation
- WA0107 Secure flexible-fare flight
- WA0108 Secure overnight stays
- WA0109 Forward meeting dates and venues to relevant person/s
- WA0110 Identify health requirements, entry requirements , local currency exchange rate and any other as requested

Supporting Evidence

- SE0101 Unit budget
- SE0102 Copy of travel vouchers
- SE0103 Copy of transport voucher
- SE0104 Proof of communication to relevant stakeholders
- SE0105 Proof of confirmation indication dietary requirements

8.2.1 WM-08-WE02: Apply basic knowledge of completing necessary documentation

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0201 Process all required submissions
- WA0202 Process all procurement documentation
- WA0203 Collected relevant travel documentation
- WA0204 Establish travel routes
- WA0205 Research additional travel information which includes but is not limited to the following: protocol, time zones, weather

Supporting Evidence

- SE0201 Relevant policy and procedures on procurement standards
- SE0202 Approved submission cover
- SE0203 Maps with travel routes

8.2.3. WM-08-WE03: Distribute the prepared itinerary

Scope of Work Experience

The person will be expected to engage in the following work activities:

- WA0301 Design a checklist/guide according to given specifications for the intended trip
- WA0302 Design an itinerary according to the approved checklist/guidelines
- WA0303 Distribute the prepared itinerary to the relevant person/s
- WA0304 Communicate with the recipients to confirm receipt of itinerary

Supporting Evidence

- SE0301 Checklist with trip specifications
- SE0302 Designed itinerary
- SE0303 Proof of distribution
- SE0304 Proof of communication with stakeholders regarding itineraries
- SE0305 Proof of recorded outgoing documents

8.3 Contextualised Workplace Knowledge

- Relevant understanding of policy and procedures on procurement standards
- Organisational processes and procedures related to business travel
- Organisational procedures for internal and external communication and liaison with internal and external clients

8.4 Criteria for Workplace Approval

Physical Requirements:

- Computer, printer, fax, telephone and copier

- In and out trays
- Storing system for files and other records
- Operating budget

Human Resource Requirements:

- Supervisor or mentor
- Qualified with 3 years of experience in a unit
- Supervisor/learner ratios 1:3

Legal Requirements:

- Legally compliant venue, (i.e. fire protection devices, OHS and other legislation)
- Quality Management System which includes all relevant policies and procedures
- Code of Conduct
- Professional registration with relevant body

8.5 Additional Assignments to be Assessed Externally

None

SECTION 4: STATEMENT OF WORK EXPERIENCE

Curriculum Number:	334302001
Curriculum Title:	Management Assistant

Learner Details	
Name:	
ID Number:	

Employer Details	
Company Name:	
Address:	
Supervisor Name:	
Work Telephone:	
E-Mail:	

334302001-WM-01, Perform administrative and meeting support functions to support management, NQF Level 5, Credits 12

WM-01-WE01	Perform day-to-day administrative tasks such as maintaining information files and processing paperwork		
	Scope Work Experience	Date	Signature
WA0101	Set up and manage paper or electronic filing systems, recording information, updating paperwork, or maintaining documents, such as attendance records, correspondence, or other material		
WA0102	Operate office equipment, such as fax machines, copiers, or phone systems and arrange for repairs when equipment malfunctions		
WA0103	Maintain scheduling and event calendars		
WA0104	Complete forms in accordance with company procedures		
WA0105	Schedule and confirm appointments for clients, customers, or supervisors		
WA0106	Make copies of correspondence or other printed material		
WA0107	Locate and attach appropriate files to incoming correspondence requiring replies		
WA0108	Open, read, route, and distribute incoming mail or other materials and answer routine letters		
WA0109	Review work done by others to check for correct spelling and grammar, ensure that company format policies are followed, and recommend revisions		
WA0110	Manage projects or contribute to committee or team work		
WA0111	Mail newsletters, promotional material, or other information		
WA0112	Order and dispense supplies		
WA0113	Establish work procedures or schedules and keep track of the daily work of clerical staff		

WA0114	Prepare and mail checks		
WA0115	Supervise other clerical staff and provide training and orientation to new staff		
	Supporting Evidence	Date	Signature
SE0101	Editing (accuracy, spelling, format)		
SE0102	Filing		
SE0103	Supplies/asset register		
SE0104	Procedures developed		
SE0105	Schedules		
SE0106	Training packs		
SE0107	Electronic diary		
WM-01-WE02	Organise at least three different kinds of meetings		
	Scope Work Experience	Date	Signature
WA0201	Prepare meeting packs, agendas, and audio visual aids for presentations		
WA0202	Attend meetings take notes or minutes and participate where required		
WA0203	Apply appropriate meeting protocol for the taking of decisions (quorums, proxy votes, motions, resolutions, decisions and actions		
WA0204	Record information from meetings or other formal proceedings		
WA0205	Compose, type, and distribute meeting notes, routine correspondence, or reports, such as presentations or expense, statistical, or monthly reports		
WA0206	Proof read and edit documentation required for internal use and meetings/appointments prior to further distribution to supervisor/executive		

	Supporting Evidence	Date	Signature
SE0201	Attendance registers		
SE0202	Minutes of different meetings		
SE0203	Decision and action lists		
SE0204	Editing (accuracy, spelling, format)		
SE0205	Procurement of catering (dietary requirements applied)		
SE0206	Meeting packs		
WM-01-WE03	Apply effective and accurate information processing skills to create professional documentation		
	Scope Work Experience	Date	Signature
WA0301	Accurately produce and format office documentation including but not limited to business letters/concise, meeting documentation and reports		
WA0302	Check documentation for accuracy and correct any errors using appropriate tools		
WA0303	Prepare invoices, reports, memos, letters, financial statements, and other documents, using word processing, spreadsheet, database, or presentation software		
WA0304	Prepare responses to correspondence containing routine inquiries		
WA0305	Coordinate and direct office services, such as records, departmental finances, budget preparation, personnel issues, and housekeeping, to aid executives		
	Supporting Evidence	Date	Signature
SE0301	Business letters/concise, meeting documentation, reports and advertising, invoices, reports, memos, letters, financial statements		
SE0302	Editing (accuracy, spelling, format)		

SE0303	Responses to queries		
SE0304	Records of office services		

	Contextualised Workplace Knowledge	Date	Signature
1	Relevant understanding of the organisation processes and procedures		
2	The nature of the organisation code of conduct standards		
3	Organisational procedures for internal and external communication and liaison with internal and external clients		
4	Organisational procedures for employee wellness		
5	Disability regulations		

	Additional Assignments to be Assessed Externally	Date	Signature

334302001-WM-02, Apply ready for work standards to everyday work activities, NQF Level 5, Credits 25

WM-02-WE01	Apply ethics and values of the company to everyday business dealings		
	Scope Work Experience	Date	Signature
WA0101	Sign the organisations Code of Conduct		

WA0102	Apply the values and mission statement of the company to everyday working conditions		
WA0103	Conduct ethical conduct and values towards customers and colleagues		
	Supporting Evidence	Date	Signature
SE0101	Signed Code of conduct		
SE0102	Performance evaluation		
SE0103	Feedback reports		
SE0104	Emails and memos		
WM-02-WE02	Apply appropriate personal and interpersonal skills to enhance smooth relations with internal and external stakeholders and promoting professional image of the organisation		
	Scope Work Experience	Date	Signature
WA0201	Compile a guideline document on appropriate interpersonal skills to accurately deal with conflicts, confrontations and disagreements with internal and external stakeholders and circulate to colleagues		
WA0202	Identify acceptable and non-acceptable professional image displayed by different stakeholders in a work environment and suggest remedial changes that will enhance the professional image appropriate/applicable to the organisation		
WA0203	Compile a portfolio on a specific country on applicable customs and protocol and present this to your colleagues through a presentation on protocol procedures regarding greetings, personal space, etiquette and specific customs, as part of the preparation for receiving international guest/s		
	Supporting Evidence	Date	Signature
SE0201	Guideline document		
SE0202	Feedback reports		

SE0203	Portfolio of evidence		
SE0204	Emails and memos		
WM-02-WE03	Apply time management skills to all supportive tasks for the unit/division to be able to meet operational targets		
	Scope Work Experience	Date	Signature
WA0301	Obtain from the supervisor / organisational guidelines with acceptable time lines for each activity against a standard norm		
WA0302	Identify weaknesses in current work processes in terms of poor time management		
WA0303	Identify the top time wasters that impact on the organisation's productivity with a view to minimizing their negative influence		
WA0304	Plan the work and workflow to accomplish the set targets		
WA0305	Identify the key activities required to complete a specific project and all tasks and work procedures are analysed and assigned to a specific time frame		
WA0306	Analyse work processes and discover new ways to complete them efficiently		
WA0307	Report on the targets and deviations		
WA0308	Progress with work plans is monitored on an on-going basis and amendments are made where necessary		
WA0309	Suggest ways of improving on productivity		
	Supporting Evidence	Date	Signature
SE0301	Report on progress and achievements		
SE0302	Feedback reports		
SE0303	Schedules		
SE0304	Action plans		

SE0305	Email, faxes and mail responses		
WM-02-WE04	Inform colleagues on stress management techniques through a presentation		
	Scope Work Experience	Date	Signature
WA0401	Identify two potential internal sources and two external sources of stress		
WA0402	Prepare a presentation to colleagues on the symptoms of stress and the consequences of stress overload, and suggest ways in reducing unwanted stress		
WA0403	Range evidence is required for three physical, three emotional, and three behavioural symptoms		
	Supporting Evidence	Date	Signature
SE0401	Presentation on stress management		
SE0402	Email, faxes and mail responses		
WM-02-WE05	Identify and advise on barriers and discriminatory practices regarding disability		
	Scope Work Experience	Date	Signature
WA0501	Identify disability barriers in the workplace		
WA0502	Suggest possible remedial actions to improve disability access in the workplace		
	Supporting Evidence	Date	Signature
SE0501	Disability access improvement suggestions		

	Contextualised Workplace Knowledge	Date	Signature
1	Relevant understanding of the organisation processes and procedures		

2	The nature of the organisation code of conduct standards		
3	Organisational procedures for internal and external communication and liaison with internal and external clients		
4	Organisational procedures for employee wellness		
5	Disability regulations		

	Additional Assignments to be Assessed Externally	Date	Signature
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334302001-WM-03, Handle customer and clients queries and liaison in an office, NQF Level 5, Credits 8

WM-03-WE01	Handle customer and clients queries and liaison		
	Scope Work Experience	Date	Signature
WA0101	Liaise with clients, suppliers and other staff		
WA0102	Meet and greet visitors at all levels of seniority		
WA0103	Screen phone calls, enquiries and requests, and handle them when appropriate		
WA0104	Answer to client queries		
WA0105	Write feedback reports to clients and management on queries received		
	Supporting Evidence	Date	Signature
SE0101	Relevant documentation		

SE0102	Feedback reports		
SE0103	Customer feedback		
SE0104	Email, faxes and mail responses		
WM-03-WE02	Work in an office conveying specialized knowledge in response to customer queries		
	Scope Work Experience	Date	Signature
WA0201	Manage the office for a period of 5 hours per week for a period of 4 months		
WA0202	Compile a weekly list of frequently asked questions and the answers thereof for a period of 3 months		
WA0203	Reference information using the relevant sources during above period		
WA0204	Record customer requests on a system (book, electronic) and follow through to completion		
	Supporting Evidence	Date	Signature
SE0201	Timesheets		
SE0202	Number of clients helped		
SE0203	List of frequently asked questions and the answers thereof		
SE0204	Customer request book		
WM-03-WE03	Maintain a comfortable environment for customers and staff		
	Scope Work Experience	Date	Signature
WA0301	Maintain the service area of the office and ensure it is conducive for staff and customers		
WA0302	Display/reception areas and notice boards are kept updated and attractive on a daily basis		
WA0303	Keep furniture out of the way and not causing		

	obstructions to users or staff		
	Supporting Evidence	Date	Signature
SE0301	Photos of the office		

	Contextualised Workplace Knowledge	Date	Signature
1	Legislation, standards, policies, and procedures followed in the company relevant to customer service and liaison		
2	Relevant occupational health and safety requirements applicable in the work/company/organization and its processes		
3	Organization culture and typical customer profile		
4	Company's service level agreements and policies		
5	Company's code of conduct		
6	Organisational procedures for internal and external communication and liaison with internal and external clients		

	Additional Assignments to be Assessed Externally	Date	Signature

334302001-WM-04, Assist in planning and coordinating at least two special events/conferences, NQF Level 5, Credits 20

WM-04-WE01	Assist with planning at least two conferences and or events		
	Scope Work Experience	Date	Signature
WA0101	Confirm purpose, required outcomes and style of conference/events with convener/s		
WA0102	Procure the required inventory of backdrops, computers, projectors and other materials		
WA0103	Confirm conference facilities requirements, budget, and preparation timeline with conference convener/s		
WA0104	Prepare a call for papers/presentations in accordance with conference purpose and style		
WA0105	Draft conference/event program in line with stated purpose, and balance choice of program elements to allow outcomes to be achieved		
WA0106	Invite speakers/presenters in accordance with conference/event brief		
WA0107	Plan conference/event administration requirements and tasks, processes and resources to ensure efficient management of conference data and resources		
	Supporting Evidence	Date	Signature
SE0101	Completed checklists of relevant organisational policies and procedures for planning and managing conferences		
SE0102	Budget report for project		
SE0103	Milestone report on activities		
SE0104	Portfolio of reference material related to conference venues, transport, accommodation and catering		
SE0105	Completed conference documentation		

SE0106	List of relevant contact persons, including speakers, clients and management		
WM-04-WE02	Organise logistics for conference and or event		
	Scope Work Experience	Date	Signature
WA0201	Support the coordination of requirements for the events(Range: includes but not limited to venues, caterers, musicians, sounds and speakers, photographers, equipment hires, florist)		
WA0202	Assist with confirming layouts and decorations at the event location based on the requirements of the customer and the event/conference type		
WA0203	Ensure the seating arrangements and the number of seats is layed out according the clients brief		
WA0204	Record acceptances, receipt fees and confirm participants within designated timelines		
WA0205	Confirm program details and assist with preparing conference papers/event presentations in accordance with speakers' requirements and conference timeline		
WA0206	Dispatch pre conference/event information to participants within designated timelines		
WA0207	Register participants in accordance with planned registration procedures		
WA0208	Communicate to participants any late changes to program		
WA0209	Manage administration requirements during conference/event in accordance with conference plan/schedule		
	Supporting Evidence	Date	Signature
SE0201	Completed checklists of relevant organisational policies and procedures for planning		
SE0202	Electronic tools used in managing confirmations and fees payments		

SE0203	Presentation packs		
SE0204	Conference/event programme and related documentation		
SE0205	Completed conference/event documentation		
SE0206	List of relevant contact persons, including speakers, clients and management for dispatch purposes		
WM-04-WE03	Follow up on conference and or event proceedings		
	Scope Work Experience	Date	Signature
WA0301	Record, and/or follow up conference/event outcomes in accordance with organisational requirements		
WA0302	Post-conference correspondence is prepared and dispatched within designated timelines		
WA0303	Collect receipts to assist with processing payments in accordance with organisational procedures and audit requirements		
	Supporting Evidence	Date	Signature
SE0301	Electronic tools used in managing receipts		
SE0302	Invoices and receipts		
SE0303	Budget report for project for audit purposes		
SE0304	Presentation packs to be distributed to relevant stakeholders		
SE0305	Completed conference/event documentation and dispatch orders		
SE0306	List of relevant contact persons, including speakers, clients and management dispatched to		

	Contextualised Workplace Knowledge	Date	Signature
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1	Organisational policies, procedures and work instructions		
2	Standard confirmation and RSVP templates		
3	Organisational conference paper/presentation formats		
4	Organisational OHS regulations		

	Additional Assignments to be Assessed Externally	Date	Signature
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334302001-WM-05, Procure and allocate resources, NQF Level 5, Credits 15

WM-05-WE01	Procure office materials, supplies and or equipment		
	Scope Work Experience	Date	Signature
WA0101	Check the availability of budget prior to procurement of goods or services		
WA0102	Source quotations for the procurement of goods and services for the unit		
WA0103	Complete forms in accordance with company procedures		
WA0104	Order materials, supplies, or equipment		
WA0105	Maintain a database of service providers		
WA0106	Facilitate and track quotes		
WA0107	Sign receipt for goods and/or cash received		
WA0108	Assist in basic procurement and requisition		

WA0109	Contact clients to obtain or relay information		
	Supporting Evidence	Date	Signature
SE0101	Budgets		
SE0102	Quotations		
SE0103	Requisition forms		
SE0104	Purchase orders		
SE0105	List of service providers		
SE0106	Receipts and invoices		
SE0107	Proof of communication with clients		
WM-05-WE02	Allocate resources		
	Scope Work Experience	Date	Signature
WA0201	Apply the organisational policies and procedures in relation to resource management		
WA0202	Manage petty cash system		
WA0203	Record income and expenditure of the unit		
WA0204	Disburse money for petty cash transactions		
WA0205	Respond to queries and enquiries		
WA0206	Manage the flow of procurement and submission documents according to the company's policies and procedures		
WA0207	Report maintenance or equipment problems to appropriate personnel		
WA0208	Select resources needed to accomplish tasks		
WA0209	Distribute materials and supplies to employees or customers		

	Supporting Evidence	Date	Signature
SE0201	Resource management policies and procedures		
SE0202	Proof of response to queries and enquiries		
SE0203	Decision and action lists		
SE0204	Procurement and submission documentation		
SE0205	Resource allocation register		
WM-05-WE03	Manage assets and stocktaking		
	Scope Work Experience	Date	Signature
WA0301	Manage the assets of the unit according to an organizational policy		
WA0302	Do inventory and stock control		
WA0303	Maintain asset register of the relevant department		
WA0304	Dispose of assets according asset policy of the organisation		
WA0305	Manage the consumables of the unit by controlling the consumable stock register		
	Supporting Evidence	Date	Signature
SE0301	Asset register		
SE0302	Consumable stock register		
SE0303	Completed asset disposal forms		
SE0304	Inventory and stock control checklist		

	Contextualised Workplace Knowledge	Date	Signature

1	Relevant understanding of the organisation procurement processes and procedures		
2	Legislation, standards, policies, and procedures followed in the company relevant to customer service and liaison		
3	Organisational resource management regulations		
4	Relevant occupational health and safety requirements applicable in the work/company/organization and its processes		

	Additional Assignments to be Assessed Externally	Date	Signature
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334302001-WM-06, Manage a paperless office, NQF Level 5, Credits 20

WM-06-WE01	Plan the filing structure and storage of documents		
	Scope Work Experience	Date	Signature
WA0101	Hold a brainstorming session with various members in your organisation to develop a drawer and folder type structure for your entire organisation		
WA0102	Set up a document management system consisting of computer software that allows you to performs simple tasks such as filing, indexing and document retrieval to more complex tasks such as workflow		
WA0103	Train staff members who will be responsible for maintaining the file structures		
WA0104	Identify and train other staff members on the use of the file structures and who will scan documents will		
WA0105	Identify staff to scan documents for digital storage		

WA0106	Compile a list of guidelines for e-filing of documentation and correspondence		
	Supporting Evidence	Date	Signature
SE0101	E- Filing guidelines		
SE0102	Checklist for e-filing		
WM-06-WE02	Apply security features to e-filing of documentation		
	Scope Work Experience	Date	Signature
WA0201	Identify documents that need to be accessed more frequently and quickly		
WA0202	Provide confidentiality by applying security measures against unauthorized entry such as routers, firewalls, antivirus software and passwords		
WA0203	Apply file property settings to ensure that documents stored electronically cannot be inadvertently modified or destroyed		
WA0204	Send, receive, file and archive documents according to company processes and procedures		
WA0205	File documents according to processes and procedures		
	Supporting Evidence	Date	Signature
SE0201	E-Filing processes and procedures followed		
SE0202	E-filed documentation		
SE0203	Security guidelines for documentation		
WM-06-WE03	Utilise an e-diary for daily planning of work		
	Scope Work Experience	Date	Signature
WA0301	Keep track of appointments in an electronic form		
WA0302	Schedule and confirm appointments for clients, customers, or supervisors using an electronic diary		

WA0303	Share diaries between other relevant diary users to synchronise activities and appointments		
WA0304	Book meetings using an electronic diary		
WA0305	Utilise the electronic diary to book and control the use of meeting venues and boardrooms.		
	Supporting Evidence	Date	Signature
SE0301	Copy of calendar invite		
SE0302	Proof of appointments scheduled using an electronic diary		

	Contextualised Workplace Knowledge	Date	Signature
1	Relevant understanding of the organisation processes and procedures in document management		
2	Legislation, standards, policies, and procedures followed in the company relevant to document management and electronic filing		
3	Security features of documentation		

	Additional Assignments to be Assessed Externally	Date	Signature

334302001-WM-07, Apply supervisory skills to coordinate and direct clerical staff activities, NQF Level 5, Credits 20

WM-07-WE01	Apply supervisory skills to coordinate and direct clerical staff activities		
	Scope Work Experience	Date	Signature
WA0101	Allocate work activities to clerical staff according to set standards of the organization		
WA0102	Provide clarity of job assignments and assist clerical staff to increase their skill level		
WA0103	Provide advice and on-going feedback about the employee's performance		
WA0104	Arrange, coordinate and provide training of clerical staff for continuous professional development		
	Supporting Evidence	Date	Signature
SE0101	Work schedule		
SE0102	Performance agreements		
SE0103	E-mails		
SE0104	Guideline documents		
SE0105	Memorandums to staff		
SE0106	Scheduled Sectional/Staff Meetings		
SE0107	Notes from briefing sessions		
WM-07-WE02	Apply basic knowledge of human resource related legislative, governance, policies and procedures		
	Scope Work Experience	Date	Signature
WA0201	Check the leave forms and attendance/absenteeism registers on a daily basis.		
WA0202	Identify the types of leave and match the leave forms with the registers.		

WA0203	Send relevant information to the HR office as per organizational policies.		
WA0204	Answer basic questions regarding leave and seek information regarding policies.		
WA0205	Compile a report detailing queries regarding the employee handbook or orientation manual and update manager		
WA0206	Observe and record any violations of Labour Act according to Employment Act		
WA0207	Establish work procedures or schedules and keep track of the daily work of clerical staff		
WA0208	Supervise other clerical staff and provide training and orientation to new staff		
WA0209	Supervise clerical or administrative personnel		
WA0210	Train personnel on latest development and processes related to office administration.		
WA0211	Assist in compiling HRM and HRD documents		
WA0212	Provide general support regarding leave and other HR activities		
	Supporting Evidence	Date	Signature
SE0201	Checked copies of relevant leave forms		
SE0202	Updated attendance/absenteeism register		
SE0203	Employee handbook and contracts		
SE0204	Orientation manual		
SE0205	Checklist for basic Compliance : <ul style="list-style-type: none"> ○ BCEA ○ OHS Act 		
WM-07-WE03	Apply OHS policies and procedures to ensure safe working conditions		

	Scope Work Experience	Date	Signature
WA0301	Create a checklist/guide for health and emergency procedures for office staff		
WA0302	Comply with local, and company health and safety regulations.		
WA0303	Demonstrate knowledge of facility guidelines to ensure physical safety of customers, attendees, employees, and organizers including emergency shutdown procedures		
WA0304	Be aware of evacuation routes, fire extinguisher location and use, shut-down procedures and safety manuals		
WA0305	Explain the importance of disseminating information to customers addressing potential safety hazards and security issues, e.g., display safety and security information and materials in a public area.		
WA0306	Maintain a sanitary and clutter-free work environment.		
WA0307	Use equipment and tools safely		
WA0308	Know to whom one should report any safety hazards or suspicious people or activity		
WA0309	Create a resource base to manage emergency situations		
	Supporting Evidence	Date	Signature
SE0301	Signs for safety procedures in relevant places		
SE0302	Evacuation plans		
SE0303	Checklist for basic Compliance: <ul style="list-style-type: none"> ○ BCEA ○ OHS Act 		

	Contextualised Workplace	Date	Signature

	Knowledge		
1	Organisational processes and procedures for supervising, implementing and maintaining processes and procedures at the area of responsibility		
2	Organisation processes and procedures for the completion of administration at the area of responsibility		
3	Labour related legislation impacting on area of responsibility		
4	Organisation processes and procedures for the implementation of OHS legislation impacting on area of responsibility		

	Additional Assignments to be Assessed Externally	Date	Signature

334302001-WM-08, Prepare a trip itinerary, NQF Level 4, Credits 15

WM-08-WE01	Finalise the exact requirements for the trip		
	Scope Work Experience	Date	Signature
WA0101	Confirm the budget for the trip		
WA0102	Determine preferred modes of travel		
WA0103	Source accommodation venues		
WA0104	Confirm selected venues		
WA0105	Confirm selected transportation		

WA0106	Secure flexible-fare flight		
WA0107	Secure overnight stays		
WA0108	Forward meeting dates and venues to relevant person/s		
WA0109	Identify health requirements, entry requirements , local currency exchange rate and any other as requested		
	Supporting Evidence	Date	Signature
SE0101	Unit budget		
SE0102	Copy of travel vouchers		
SE0103	Copy of transport voucher		
SE0104	Proof of communication to relevant stakeholders		
SE0105	Proof of confirmation indication dietary requirements		
WM-08-WE02	Apply basic knowledge of completing necessary documentation		
	Scope Work Experience	Date	Signature
WA0201	Process all required submissions		
WA0202	Process all procurement documentation		
WA0203	Collected relevant travel documentation		
WA0204	Establish travel routes		
WA0205	Research additional travel information which includes but is not limited to the following: protocol, time zones, weather		
	Supporting Evidence	Date	Signature
SE0201	Relevant policy and procedures on procurement standards		

SE0202	Approved submission cover		
SE0203	Maps indication travel routes		
WM-08-WE03	Distribute the prepared itinerary		
	Scope Work Experience	Date	Signature
WA0301	Design a checklist/guide according to given specifications for the intended trip		
WA0302	Design an itinerary according to the approved checklist/guidelines.		
WA0303	Distribute the prepared itinerary to the relevant person/s		
WA0304	Communicate with the recipients to confirm receipt of itinerary		
	Supporting Evidence	Date	Signature
SE0301	Checklist with trip specifications		
SE0302	Designed itinerary		
SE0303	Proof of distribution		
SE0304	Proof of communication with stakeholders regarding itineraries		
SE0305	Proof of recorded outgoing documents		

	Contextualised Workplace Knowledge	Date	Signature
1	Relevant understanding of policy and procedures on procurement standards		
2	Organisational processes and procedures related to business travel		

3	Organisational procedures for internal and external communication and liaison with internal and external clients		
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	Additional Assignments to be Assessed Externally	Date	Signature
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