**PRESENT INFORMATION IN REPORT FORMAT**

**US 110023**

**NQF LEVEL:** 4

**CREDITS: 6**

**NOTIONAL HOURS: 60**



**POE GUIDE**

|  |  |
| --- | --- |
| **Name** |  |
| **Contact Address** |  |
| **Telephone (H)** |  |
| **Telephone (W)** |  |
| **Facsimile** |  |
| **Cellular** |  |

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## CONTACT DETAILS

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Unit Standard:** | 110023 | | | | | | | |
| **Course:** | Present information in report format | | | | | | | |
| **Assessor Details** | | | | | | | | |
| **Name** |  | | | | | | | |
| **Branch** |  | | Registration No: | | | | |  |
| **Contact Details** | email: |  | | | | | | |
| Phone: |  | Fax: | |  | | | |
| **Moderator Details** | | | | | | | | |
| **Name** |  | | | | | | | |
| **Branch** |  | | | | | | | |
| **Contact Details** | email: |  | Registration No: | | | |  | |
| Phone: |  | Fax: | |  | | | |
| **Candidate Details** | | | | | | | | |
| **Surname** |  | | | Name | |  | | |
| **College** |  | | | ID No | |  | | |
| **Branch** |  | | | | | | | |
| **Contact Details** | email: |  | | | | | | |
| Phone: |  | | Fax: |  | | | |

## COMPETENCE

Congratulations on completing this programme. We sincerely hope you enjoyed the programme and that the learning experience was enriching.

The fact that you have attended training, however, is not sufficient evidence of your competence for us to award you a certificate and the credits attached to this programme. You are required to undergo assessment in order to prove your competence to achieve credits leading to a national qualification.

### Being Declared Competent Entails:

Competence is the ability to perform whole work roles, to the standards expected in employment, in a real working environment.

There are three levels of competence:

**Foundational competence**: an understanding of what you do and why.

**Practical competence**: the ability to perform a set of tasks in an authentic context.

**Reflexive competence**: the ability to adapt to changed circumstances appropriately and responsibly, and to explain the reason behind the action.

To receive a certificate of competence and be awarded credits, you are required to provide evidence of your competence by compiling a portfolio of evidence, which will be assessed by a Services SETA accredited assessor.

### You Have to Submit a Portfolio of Evidence

A portfolio of evidence is a structured collection of evidence that reflects your efforts, progress and achievement in a specific learning area, and demonstrates your competence.

### The Assessment of Your Competence

Assessment of competence is a process of making judgments about an individual's competence through matching evidence collected to the appropriate national standards. The evidence in your portfolio should closely reflect the outcomes and assessment criteria of the unit standards of the learning programme for which you are being assessed.

To determine a candidate’s knowledge and ability to apply the skills before and during the learning programme, formative assessments are done to determine the learner’s progress towards full competence. This normally guides the learner towards a successful summative (final) assessment to which both the assessor and the candidate only agree when they both feel the candidate is ready.

Should it happen that a candidate is deemed not yet competent upon a summative assessment, that candidate will be allowed to be re-assessed. The candidate can, however, only be allowed two reassessments.

When learners have to undergo re-assessment, the following conditions will apply:

Specific feedback will be given so that candidates can concentrate on only those areas in which they were assessed as not yet competent.

Re-assessment will take place in the same situation or context and under the same conditions as the original assessment.

Only the specific outcomes that were not achieved will be re-assessed.

Candidates who are repeatedly unsuccessful will be given guidance on other possible and more suitable learning avenues.

In order for your assessor to assess your competence, your portfolio should provide evidence of both your knowledge and skills, and of how you applied your knowledge and skills in a variety of contexts.

This Candidate’s Assessment Portfolio directs you in the activities that need to be completed so that your competence can be assessed and so that you can be awarded the credits attached to the programme.

### Appeals & Disputes

The candidate has the right to appeal against assessment decision or practice they regard as unfair. An Appeals and Disputes procedure is in place and communicated to all assessment candidates in order for them to appeal on the basis of:

Unfair assessment

Invalid assessment

Unreliable assessment

Unethical practices

Inadequate expertise and experience of the assessor

Appeals have to be lodged in writing (Candidate Appeal Form) & submitted to the Training Provider internal moderator within 48 hours, following the assessment in question. The moderator will consider the appeal & make a decision regarding the granting of a re-assessment. The learner will be informed about the appeal-outcome within 3 days of lodging the appeal. Should the learner not be satisfied with the internal appeal outcome, the learner will be advised of the rights to refer the matter to the Services SETA ETQA.

## ASSESSMENT PROCESS FLOW

Assessment Activities conducted as per the Assessment Plan

Assessment Plan agreed by candidate & completed by the assessors before the actual assessment

**CANDIDATE**

Detailed Assessor Report compiled & forwarded for Moderation

**ASSESSMENT**

Assessment Guide submitted to Training Provider as per Assessment Plan

Feedback Report Completed by Assessor & individual feedback given to candidate

Appeal form completed by the candidate in event of dispute

Record of Learning Updated

Assessment Results Moderated

Action Plan completed by Assessor

All records & evidence filed

**SETA**

Completed Assessor report/Moderator report/Record of Learning forwarded to SETA

Approval and Certification obtained from SETA

SETA to register on National Learner Database

Certificate of Competencies issued to successful candidates

## ASSESSMENT STRATEGY

This assessment exercise will cover the outcomes required in order to achieve a competency certificate. The purpose of the assessment process is to gather enough evidence to prove all unit standard outcomes were achieved.

Competency will be assessed through class hands on tasks recorded in POE, input and performance based assessment, assignments which will require a fair amount of research and observation in essential embedded knowledge. Assessment evidence should be sufficient to prove that the candidate is competent in all require tasks set by the unit standards.

A summative assessment will be conducted at end of course to confirm assessment judgments. Principles of fairness, validity, practicability, reliability and consistency will be adhered to throughout.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Qualification** |  | | **Unit Standard Codes** | | 110023 |
| **Level** | Level 4 | | **Credits** | | 6 |
| **Purpose of Assessment** | This Unit standard is intended for all persons working in administration in commercial and non-commercial organisations and who is responsible for presenting information in report format. | | | | |
| **Assessment Procedures** | An integrated assessment approach will be followed to allow for practical and theoretical components. This entails the assessment of a number of unit standards, outcomes and criteria together in one assessment activity.  Candidates are not only assessed against specific outcomes, but also on critical outcomes, attitudes and values.  A summative competence judgment will be made on the basis of all assessment evidence produced, that proves that the candidate can be consistently judged as competent against the outcomes of the unit standards and the qualification as a whole.  Candidates take responsibility for their own assessment and should notify the assessor when they are ready for assessment.  Candidates will receive feedback after the summative assessment, which will be discussed after all assessments have been completed.  All assessments will be reviewed to ensure that assessment practices are valid, fair, transparent, consistent and current.  An Internal/External moderator will moderate assessment practices.  The SETA will also conduct external moderation. | | | | |
| **Context of Assessment** | **Assessment Methods** | **Assessment Conditions** | | **Who will conduct assessment** | **Assessment results and feedback** |
| **Written assessments** (exercises; assignments; projects)  **Oral**  Observation checklist | Input based assessments | | Assessor | 2 weeks after successful submission |

## ASSESSMENT PREPARATION

Preparing the Candidate

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name of Candidate** |  | | **Date** |  |
| **Time** |  |
| **Name of Assessor** |  | | **Venue** |  |
| **How to prepare the candidate** | | **Document Requirements** | **Agree (tick)** | **Action Required** |
| Explain to the candidate why you are meeting and the purpose of the assessment. | | NQF Framework Assessment process |  |  |
| Discuss the assessment plan in detail. | | Assessment strategy |  |  |
| Explain assessment process, show assessment instruments to candidate and describe assessment conditions. | | Assessment instruments |  |  |
| Identify the role-players during assessment. | | Assessors  Moderator |  |  |
| Describe the evidence required to be declared competent. | | Examples of evidence |  |  |
| Explain how evidence will be judged. | |  |  |  |
| Explain to the candidate how to prepare: Give candidate summative task description. | | Summative task description |  |  |
| Confirm with the candidate what he/she should bring to the assessment. | | Detailed briefing on exact requirements to be given to candidate |  |  |
| Ensure that candidate understands the procedures of all assessment practices. | | Appeals procedure  Moderation procedure  Assessment policy |  |  |
| Ask the candidate if he/she foresees any problems or identify any special needs. | | List needs |  |  |
| Check with candidate that he/she clearly understands the assessment procedure. | |  |  |  |
| **Comments or questions:** | | | | |
|  | | | | |
|  | | | | |

## AGREED ASSESSMENT PLAN

|  |  |  |  |
| --- | --- | --- | --- |
| Candidate's Name: |  | | |
| Assessor's Name: |  | | |
| Unit Standard Title: | Present information in report format | | |
| Special Assessment Requirements |  | | |
| Event | Date, time and location | Resources required | Evidence to be generated |
| Attend Training. |  | Training material, Facilitator | Attendance Register |
| Complete formative assessment |  | Formative assessment workbook | Completed portfolio of evidence |
| Complete summative assessment |  | Summative assessment workbook | Completed portfolio of evidence |
| Submit Portfolio of Evidence to Training Provider |  |  | Acknowledgement of receipt from Training Provider |
| Assessor roles and responsibility | | | |
| Roles | Assessor  Guide  Feedback Agent  Reviewer | | |
| Responsibilities | Consult candidate re assessment, assessment process and plan.  Agree assessment process and plan with candidate.  Forward documentation to candidate: plan, guide and assessment instruments.  Assess candidate with the use of different instruments.  Provide feedback on assessment findings.  Support candidate through assessment process.  Source feedback from candidate on assessment process.  Review assessment process and outcome.  Use assessment process as opportunity to transform assessment activities and outcomes. | | |
| Candidate roles and responsibility | | | |
| Roles | Candidate  Feedback agent  Reviewer | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Responsibilities | Be available for assessment.  Be actively involved in the consultative process.  Learn from the assessment process.  Provide feedback to the assessor in terms of the assessment as learning activity.  Provide feedback to the assessor on the efficacy of the assessment process.  Review own role and assessor role in the assessment process. | | | | |
| Assessment Instruments | Portfolio of evidence  Observation checklist  Questioning | | | | |
| Assessment Process | | | | | |
| Step | | | | | Date |
| Evaluation of POE addressing Essential Embedded Knowledge in unit standards.  Evaluation of Research Projects and other evidence address specific unit standards.  Consultation: assessment plan and assessment activities and instruments. Pre-assessment moderation and interviews conducted at this stage.  Observation: feedback on assessment against specific outcomes, critical outcomes in unit standards.  Feedback: to candidate regarding sufficiency of evidence and possible interview to gain supplementary evidence.  Feedback to candidate regarding assessment findings as well as review process. | | | | |  |
| Feedback | Written feedback to be given to all stakeholders at the end of the assessment process, as well as verbal feedback to the candidate during assessment activities. | | | | |
| Recording Process | Process and findings to be recorded and submitted for record keeping purposes as well as moderation and verification. | | | | |
| Review Process | The review process is the responsibility of the assessor and the candidate. Joint reviewing will take place after feedback has been given to the candidate. | | | | |
| Right to appeal | The candidate must be advised of the right to appeal. | | | | |
| Accessibility and safety of environment | Step | | | Date | |
| Site inspection conducted.  Pre-assessment moderation conducted. | | |  | |
| Resources Required | Assignments  POE  Assessments | | | | |
|  |  | | | | |
|  | |  |  | | |
| **Candidate Signature** | | **Assessor Signature** | **Moderator Signature** | | |
| **Date** | | **Date** | **Date** | | |

|  |  |  |  |
| --- | --- | --- | --- |
| I confirm that:   * I have been consulted on and have agreed to the training and assessment process as detailed in the assessment guide. * I have been advised of my right to appeal against any assessment that is unfair, unreliable, invalid or impracticable. * I have read and understood the appeal procedure. * I know that assessments may be moderated or verified by an external party. * The purpose of the assessment has been clearly explained to me. * The criteria have been discussed with me, and I know I will be assessed against these criteria. * I know when and where I will be assessed, and I was given fair notice. * I know how the assessment will be done, and any other requirements related to the assessment.   **Signed: Date:** | | | |
| **Overall Assessment Decision** | Competent | Not Yet competent | |
| Candidate’s Signature |  | **Date** |  |
| **Assessor’s Signature** |  | **Date** |  |
| Moderator’s Signature |  | **Date** |  |

## Assessor’s declaration:

I hereby declare that I have prepared the candidate for assessment, the candidate was consulted and all stakeholders have been informed and the workplace is prepared to ensure valid and fair assessment.

|  |  |
| --- | --- |
| Assessor Name | Signature |
|  |  |

## Interview (RPL Purposes)

The purpose of the interview is two-fold:

A type of self-assessment for the candidate. It should assist the assessor in deciding the approach towards assessment in terms of making competence decisions where candidates are successful in proving their prior learning.

To determine candidate preparedness for prior learning conducted and sensitize candidates to re-assessment.

Questions

Have you attended any short courses / courses that amount to prior learning before the start of the learnership / qualification? (*Note that it should be relevant to the qualification against which RPL is being conducted*)

|  |
| --- |
|  |
|  |

Did you attend all modules of the learnership / qualification training?

|  |
| --- |
|  |
|  |

How were you prepared for assessments?

|  |
| --- |
|  |
|  |

How were assessments conducted?

|  |
| --- |
|  |
|  |

Did an accredited training provider conduct the course/s?

|  |
| --- |
|  |
|  |

Did you attend classroom training during the course?

|  |
| --- |
|  |
|  |

What work experience do you have to prove competence against a unit standard/s for RPL purposes? (State number of year’s experience)

|  |
| --- |
|  |
|  |

Do you have a relevant certificate from an approved institution?

|  |
| --- |
|  |
|  |

Do you have samples of work or other forms of evidence that can prove your competence?

|  |
| --- |
|  |
|  |

Do you have a Grade 12 (Matric) with English and Maths, or English only?

|  |
| --- |
|  |
|  |

Any evidence of competence provided during the course of the above interview must be considered during the planning phase of re-assessment and when making a judgement on candidate competence.

### LETTER OF COMMITMENT FROM THE LEARNER

Dear learner/learner

You have requested to be assessed through our organisation. To ensure effective assessment, there needs to be a commitment from you, that you will attend training if required and submit evidence of workplace application as required by the assessor.

**Declaration of commitment:**

I undertake to fulfill all the requirements of the assessment practices as specified by the assessor and service provider.

Organisation \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Full names of learner \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

### Learner ID

*Insert a certified copy of your Identify Document here:*

### Learner CV

*Insert a copy of your full CV (Curriculum Vitae) here:*

### Learner Qualifications

*Insert certified copies of relevant qualifications here:*

### Declaration of Authenticity

I \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *(full name)*, declare that the evidence presented in this portfolio of evidence represents workplace and training evidence against the unit standard US 110023 Present information in report format is my own work and has been completed me, with the exception of:

*(Detail any work that was not completed by yourself, i.e. group work, etc.)*

|  |
| --- |
|  |
|  |
|  |
|  |

In signing this, I declare that all the evidence presented in this Portfolio of Evidence is true, valid and my own work.

|  |  |
| --- | --- |
| **Learner signature** |  |
| **Date** |  |
| **Witness name** |  |
| **Witness contact details** |  |
| **Witness signature** |  |

In signing this, I declare that all the evidence presented in this Portfolio of Evidence is true, valid and my own work.

|  |  |
| --- | --- |
| **Learner signature** |  |
| **Date** |  |
| **Witness name** |  |
| **Witness contact details** |  |
| **Witness signature** |  |

### PORTFOLIO BUILDING

Your Portfolio of Evidence (PoE) contains the evidence needed to declare you competent and to award credits towards the award of this qualification to you. Evidence should be authentic and reflect both your knowledge of the subject and your ability to apply this knowledge in the workplace. Thus, evidence of day to day activities supporting the specific outcomes addressed by this learning programme should complement the theoretical learning you attended and were assessed on.

There are FIVE key steps in creating a portfolio that will reflect your competence.

### Plan Your Portfolio

Plan and document the sequence, graphics and layout of your portfolio. This will assist you in following a logical sequence, which makes the Portfolio also much more user friendly and understandable for the assessor. It will also reflect your professional approach and attitude towards the subject matter, your work and your life. Impact and appearance always contribute to or affect your chances of being taken seriously and declared competent!

### Gather The Evidence

An evidence checklist has been provided (Section 4) to tell you what evidence needs to be gathered for assessment purposes. However, there are four broad categories of evidence that you should include:

Knowledge evidence (your knowledge questionnaire).

Direct performance evidence (actual samples of your work or records of activities captured on audio or video tape).

Indirect performance evidence (documentary records of your performance e.g. appraisals, photographs, testimonials, self-assessments, customer ratings etc.).

Supplementary evidence (to confirm the authenticity of your evidence).

### Evaluate Your Evidence

Once you have collected your evidence, evaluate each piece by ensuring that it is:

Valid (relevant to the unit standard/s being assessed).

Authentic (clearly your own work).

Current (not more than 2 years old).

Sufficient (adequate to prove your competence against all of the assessment criteria and range statements in the unit standard/s).

### Cross-Reference Your Evidence To The Unit Standards

Evidence for assessment against unit standards must be linked to the outcomes of the unit standard in question. An evidence locator grid is useful for this.

## Completed Assessment Activities

*Insert your completed assessment activities and evidence here:*

## RECORD OF LEARNING

Present information in report format

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Candidate's Name: | | | | ID No | |  | |
| Assessor's Name: | | | | Ass. Reg. No | |  | |
| Moderator's Name: | | | | Mod. Reg. No | |  | |
| Date: | | | |  | | | |
| **UNIT STANDARD** | **NQF LEVEL** | **CREDITS** | **DATE OF COMPLETION** | | **SIGNATURE OF ASSESSOR** | | **SIGNATURE OF MODERATOR** |
| 110023 | 4 | 6 |  | |  | |  |

## ASSESSMENT DECISION & EVIDENCE EVALUATION RECORD

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Candidate's Name |  | | | ID No. | |  | |
| Assessor's Name |  | | | Reg. No. | |  | |
| Unit Standard Title | Present information in report format | | | | | | |
| ASSESSMENT DECISION | | | | | | | |
| Specific Outcome | | ACs | Competent | | Not Yet competent | | Comments |
| Relate the purpose, content, form, frequency and recipients of a range of reports. | | AC 1 |  | |  | |  |
| AC 2 |  | |  | |  |
| AC 3 |  | |  | |  |
| AC 4 |  | |  | |  |
| Identify information sources & organisational procedures for obtaining & distributing information. | | AC 1 |  | |  | |  |
| AC 2 |  | |  | |  |
| AC 3 |  | |  | |  |
| Compile reports related to a selected business function. | | AC 1 |  | |  | |  |
| AC 2 |  | |  | |  |
| AC 3 |  | |  | |  |
| AC 4 |  | |  | |  |
| Liase with relevant parties and verify that reported information is in accordance with requirements. | | AC 1 |  | |  | |  |
| AC 2 |  | |  | |  |
| AC 3 |  | |  | |  |
| Overall Assessment Decision. | | | | | | |  |

|  |  |  |
| --- | --- | --- |
| Comments | |  |
| Date | |  |
|  |  | |
| Signature of Assessor | Signature of Candidate | |

## Assessor’s feedback report to candidate

|  |  |  |  |
| --- | --- | --- | --- |
| **Unit Standard** | 110023 |  |  |
| **Title** | Present information in report format |  |  |
| **Candidate's Name** |  | **ID No.** |  |
| **Assessor's Name** |  | **Reg. No.** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **ASSESSMENT DECISION** | | | |
| ***Source of Evidence*** | Competent | Not Yet competent | ***Candidates Comments*** |
| Summative assessment |  |  |  |
| Formative assessment |  |  |  |
| I hereby confirm that I have been given feedback by the assessor on all the aspects of my assessment. I have been given the opportunity to ask questions and the above feedback was given by me in respect of my assessment. I am aware of the assessment process and the appeal procedure. I AGREE / DISAGREE with the assessment decision. | | | |
| Overall Assessment Decision | | |  |
| Additional Notes | | |  |
| Assessor Signature:  Date: | | | Candidate Signature:  Date: |

## Moderator's Report

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Moderator's Name |  | | | | Reg. No. | |  | |
| Assessor's Name |  | | | | Reg. No. | |  | |
| Candidate's Name |  | | | | ID No. | |  | |
| Unit Standard Title | Present information in report format | | | | | | | |
| MODERATION DECISION | | | | | | | | |
| Specific Outcome | | | ACs | Competent | | Not Yet competent | | Comments |
| Relate the purpose, content, form, frequency and recipients of a range of reports. | | | AC 1 |  | |  | |  |
| AC 2 |  | |  | |  |
| AC 3 |  | |  | |  |
| AC 4 |  | |  | |  |
| Identify information sources & organisational procedures for obtaining & distributing information. | | | AC 1 |  | |  | |  |
| AC 2 |  | |  | |  |
| AC 3 |  | |  | |  |
| Compile reports related to a selected business function. | | | AC 1 |  | |  | |  |
| AC 2 |  | |  | |  |
| AC 3 |  | |  | |  |
| AC 4 |  | |  | |  |
| Liase with relevant parties and verify that reported information is in accordance with requirements. | | | AC 1 |  | |  | |  |
| AC 2 |  | |  | |  |
| AC 3 |  | |  | |  |
| Overall Moderation Decision | | | | | | | |  |
| Feedback to Assessor | | | | | | | |  |
| Action Required | | | | | | | |  |
| Date of Moderation | | | | | | | |  |
| Signature of Moderator | |  | | | | | | |
| Signature of Assessor | |  | | | | | | |
| Signature of Candidate | |  | | | | | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| ASSESSMENT REVIEW | | | | | |
| NAME of LEARNER | | | NAME of ASSESSOR | | |
| VENUE | | | DATE of REVIEW | | |
| UNIT STANDARD | Present information in report format | | | | |
| Review Dimension | | ASSESSOR | | LEARNER/  CANDIDATE | ACTION |
| The principles/criteria for good assessment were achieved. | | Agree  Disagree | | Agree  Disagree |  |
| The assessment related to the registered unit standard. | | Agree  Disagree | | Agree  Disagree |  |
| The assessment was practical. | | Agree  Disagree | | Agree  Disagree |  |
| It was time efficient and cost-effective and did not interfere with my normal responsibilities. | | Agree  Disagree | | Agree  Disagree |  |
| The assessment instruments were fair, clear and understandable. | | Agree  Disagree | | Agree  Disagree |  |
| The assessment judgment was made against set requirements. | | Agree  Disagree | | Agree  Disagree |  |
| The venue and equipment was functional. | | Agree  Disagree | | Agree  Disagree |  |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Special needs were identified and the assessment plan was adjusted. | | | Agree  Disagree | Agree  Disagree | | |  | |
| Feedback was constructive against the evidence required. | | | Agree  Disagree | Agree  Disagree | | |  | |
| An opportunity to appeal was given. | | | Agree  Disagree | Agree  Disagree | | |  | |
| The evidence was recorded. | | | Agree  Disagree | Agree  Disagree | | |  | |
| LEARNER”S DECLARATION OF UNDERSTANDING | | | | | | | | |
| I am aware of the moderation process and understand that the moderator could declare the assessment decision invalid. | | | | | | | | |
|  | |  | | | |  | | |
| Learner | Date | Assessor | | | Date | Moderator | | Date |

## Candidate Appeal Form

|  |  |  |  |
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| Candidate's Name: | | ID No. |  |
| Assessor's Name: | | Reg. No. |  |
| Unit Standard Title: Present information in report format | | | |
| Date: | |  | |
| SECTION 1 | |  | |
| Candidate's reason for disagreeing with the assessment decision. |  | | |
| Assessor's rationale for the assessment decision. |  | | |
| Candidate's signature. |  | | |
| Assessor's signature. |  | | |

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| SECTION 2 |  |
| Moderator's decision. |  |
| Moderator's signature. |  |

## Assessor’s Contingency Plan

**Name of Assessor:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| **Unforeseen Event** | **Corrective Action To Be Taken** |
| **Candidate:** | |
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| **Equipment:** | |
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| **Role Players:** | |
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| **Environment:** | |
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| **Assessment Process:** | |
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Signature of Assessor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Moderator: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

## Learner Registration and SAQA Coding Form

| **No** | **Field** | **Description** | **Information** |
| --- | --- | --- | --- |
|  | **Personal Details** | | |
| 1 | **Learner Surname** | *As per your ID document* |  |
| 2 | **Full Names** | *As per your ID document* |  |
| 3 | **Learner Title** | *Mr, Ms, Mrs, Dr, Prof.* |  |
| 4 | **ID Number** | *RSA ID. If not, Complete next line* |  |
| 5 | **Alternative ID** | *Only complete if no RSA ID available.*  *Indicate type of alternative ID* |  |
| 6 | **Date of Birth** | *Insert date of birth* |  |
| 7 | **Gender** | *Male – M, Female – F, Other – O* |  |
| 8 | **Equity** | *Black African – BA, Black Indian Asian – BI, Black Coloured – BC, White – W, Other – O (specify)* |  |
| 9 | **Socio Economic Status** | *Employed, unemployed, student* |  |
| 10 | **Disability Status** | *None, hearing / sight / speech / movement, other (specify)* |  |
| 11 | **Geographic Area** | *List geographic area that you live in, i.e. Gauteng, Kwa Zulu Natal, Eastern Cape, Western Cape, Northern Cape, Limpopo, Polokwane, Free State, North West, Mpumalanga, Northern Province, Outside SA* |  |
|  | **Contact Details** | | |
| 12 | **Physical Address** | *State physical address* |  |
| 13 | **Postal Address** | *State PO Box, or address where mail is received* | Postal Code: |
| 14 | **Home Phone Number** | *One of the following contact details (number 12 – 16 is mandatory to complete* |  |
| 15 | **Business Phone Number** |  |  |
| 16 | **Cell Phone Number** |  |  |
| 17 | **Fax Number** |  |  |
| 18 | **Email** |  |  |
|  | **Educational Details** | | |
| 19 | **Highest Education** | *Overview of qualifications completed* |  |
| 20 | **Current Occupation** | *State current or last occupation, if unemployed.* |  |
| 21 | **Experience** | *Overview of experience in years and fields / areas* |  |
| 22 | **Years in Occupation** | *State years in last occupation* |  |
|  | **Programme Details** | | |
| 23 | **Name of Learning Programme** | *Full name of programme, i.e. National Certificate in …* | Insert Qualification Title |
| 24 | **Registration Number of Programme** | *NLRD number* | Insert NLRD Number |
| 25 | **NQF Level of programme** | *State NQF Level* | Insert Level, e.g. 4 |
| 26 | **Type of learning programme** | *Qualification, learnership, skills programme, learning programme* | Qualification |
|  | **Unit Standard Details** | | |
| 27 | **Unit Standards** | *List NLRD numbers and names of unit standards in programme.* | See attached list of unit standard |

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| **Alternative ID type** | **Equity code** | **Nationality code** | | **Citizen/residence status** |
| 521 SAQA member ID  527 Passport No  529 Driver’s licence  531 Temporary ID no  533 None  535 Unknown  537 Student no  538 Work permit no  539 Employee no  540 Birth certificate no  541 Human Sciences Research Council register no  561 ETQA record no | BA Black: African  BC Black : Coloured  BI Black : Indian / Asian  U Unknown  WH White | U Unspecified  SA South African  SDC SADC except SA (i.e. Nam to ZAI)  NAM Namibia  BOT Botswana  ZIM Zimbabwe  ANG Angola  MOZ Mozambique  LES Lesotho  SWA Swaziland  MAL Malawi  ZAM Zambia  MAU Mauritius  TAN Tanzania | SEY Seychelles  ZAI Zaire  ROA rest of Africa  EUR European countries  AIS Asian countries  NOR North American countries  SOU Central & South American countries  AUS Australia & New Zealand  OOC Other and rest of Oceania  NOT N/A: Institution | U Unknown  SA South Africa  O Other  D Dual (SA plus other) |
| Gender Code |
| M Male  F Female |

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| --- | --- | --- | --- |
| **Home language code** | **Province code** | **Disability status** | **Socioeconomic Status** |
| ENG English  AFR Afrikaans  OTH Other  SEP sePedi  SES seSotho  SET seTswana  SWA siSwati  TSH tshiVenda  U Unknown  XHO isiXhosa  XIT xiTsonga  ZUL isiZulu  NDE siNdebele | 1. Undefined 2. Western Cape 3. Eastern Cape 4. Northern Cape 5. Free State 6. Kwazulu-Natal 7. North West 8. Gauteng 9. Mpumalanga 10. Limpopo | N None  01 Sight (even with glasses)  02 Hearing (even with hearing aid)  03 Communication (talking, listening)  04 Physical (moving, standing, grasping)  05 Intellectual (difficulties in learning); retardation  06 Emotional (behavioural or psychological)  07 Multiple  09 Disabled but unspecified  U Unknown | U Unspecified  01 Employed  02 Unemployed  03 Not working – not looking for work  04 Not working – housewife/homemaker  06 Not working – scholar/full time student  07 Not working – pensioner/retired person  08 Not working – disabled person  09 Not working – not wishing to work  10 Not working – none of the above  97 N/A : Aged < 15  98 N/A : Institution |

### Unit standard

|  |  |
| --- | --- |
| SAQA | *All qualifications and part qualifications registered on the National Qualifications Framework are public property. Thus the only payment that can be made for them is for service and reproduction. It is illegal to sell this material for profit. If the material is reproduced or quoted, the South African Qualifications Authority (SAQA) should be acknowledged as the source.* |

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| **SOUTH AFRICAN QUALIFICATIONS AUTHORITY** |

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| **REGISTERED UNIT STANDARD:** |

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| **Present information in report format** |

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| --- | --- | --- | --- | --- |
| **SAQA US ID** | **UNIT STANDARD TITLE** | | | |
| 110023 | Present information in report format | | | |
| **ORIGINATOR** | | **ORIGINATING PROVIDER** | | |
| SGB Administration | |  | | |
| **QUALITY ASSURING BODY** | | | | |
| - | | | | |
| **FIELD** | | | **SUBFIELD** | |
| Field 03 - Business, Commerce and Management Studies | | | Office Administration | |
| **ABET BAND** | **UNIT STANDARD TYPE** | **PRE-2009 NQF LEVEL** | **NQF LEVEL** | **CREDITS** |
| Undefined | Regular-Fundamental | Level 4 | NQF Level 04 | 6 |
| **REGISTRATION STATUS** | | **REGISTRATION START DATE** | **REGISTRATION END DATE** | **SAQA DECISION NUMBER** |
| Reregistered | | 2012-07-01 | 2015-06-30 | SAQA 0695/12 |
| **LAST DATE FOR ENROLMENT** | | **LAST DATE FOR ACHIEVEMENT** | | |
| 2016-06-30 | | 2019-06-30 | | |

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| *In all of the tables in this document, both the pre-2009 NQF Level and the NQF Level is shown. In the text (purpose statements, qualification rules, etc), any references to NQF Levels are to the pre-2009 levels unless specifically stated otherwise.* |

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| This unit standard does not replace any other unit standard and is not replaced by any other unit standard. |

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| **PURPOSE OF THE UNIT STANDARD** |

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| This Unit standard is intended for all persons working in administration in commercial and non-commercial organisations and who is responsible for presenting information in report format.   The qualifying learner is capable of:    Relating the purpose, content, form, frequency and recipients of a range of reports to the information needs of a selected business    Identifying information sources and organisational procedures for obtaining and distributing information relevant to a selected business function.    Compiling reports related to a selected business function, ensuring content and format are appropriate to information requirements and that reporting deadlines are met    Liasing with relevant parties and verifying that reported information is in accordance with requirements and purpose of the report.   A learner accredited with this standard will also be able to plan and allocate the resources required to maximise efficiencies in an office environment whilst minimising resource costs in achieving stated objectives. |

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| **LEARNING ASSUMED TO BE IN PLACE AND RECOGNITION OF PRIOR LEARNING** |

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| Learners should be competent in:    Communication at NQF Level 3   Mathematical Literacy at NQF Level 3   Computer Literacy at NQF Level 3. |

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| **UNIT STANDARD RANGE** |

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| Listing of Reports is limited to five and compiling of Reports is limited to three for purposes of assessment because of time constraints. |

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| **Specific Outcomes and Assessment Criteria:** |

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| **SPECIFIC OUTCOME 1** |

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| Relate the purpose, content, form, frequency and recipients of a range of reports. |

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| **OUTCOME NOTES** |

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| Relate the purpose, content, form, frequency and recipients of a range of reports to the information needs of a selected business. |

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| **OUTCOME RANGE** |

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| (Assessment is limited to five reports) |

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| **ASSESSMENT CRITERIA** |

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| **ASSESSMENT CRITERION 1** |

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| 1. The regular reports are identified for a selected organisation. |

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| **ASSESSMENT CRITERION 2** |

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| 2. The information needs of the organisation are linked to the purpose of each identified report. |

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| **ASSESSMENT CRITERION 3** |

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| 3. A template is drawn up for each report in the company specific format including the mandatory content headings. |

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| **ASSESSMENT CRITERION 4** |

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| 4. A table is created listing each report, its purpose, the regular recipients and frequency of distribution. |

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| **SPECIFIC OUTCOME 2** |

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| Identify information sources & organisational procedures for obtaining & distributing information. |

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| **OUTCOME NOTES** |

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| Identify information sources and organisational procedures for obtaining and distributing information relevant to a selected business function. |

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| **ASSESSMENT CRITERIA** |

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| **ASSESSMENT CRITERION 1** |

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| 1. A table is created listing each report and the information sources required for input to the report. The information sources are linked to specific headings within the report. |

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| **ASSESSMENT CRITERION 2** |

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| 2. A table is drawn up listing each information source, from whom it is obtainable, when it is available, its level of confidentiality, and to whom it should be returned. |

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| **ASSESSMENT CRITERION 3** |

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| 3. Company procedures for obtaining information sources are identified for each information source and linked to the table above. |

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| **SPECIFIC OUTCOME 3** |

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| Compile reports related to a selected business function. |

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| **OUTCOME NOTES** |

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| Compile reports related to a selected business function, ensuring content and format are appropriate to information requirements and that reporting deadlines are met. |

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| **ASSESSMENT CRITERIA** |

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| **ASSESSMENT CRITERION 1** |

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| 1. The identified reports are compiled using current information. |

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| **ASSESSMENT CRITERION RANGE** |

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| (Assessment limited to three reports) |

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| **ASSESSMENT CRITERION 2** |

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| 2. The created templates are used to write the reports and any necessary modifications are made and noted, to ensure compliance with business requirements. |

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| **ASSESSMENT CRITERION 3** |

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| 3. The identified information sources are used to provide the information required by the organisation. |

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| **ASSESSMENT CRITERION 4** |

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| 4. The report is distributed in the required manner in time to meet the specified deadline. |

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| **ASSESSMENT CRITERION RANGE** |

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| (e-mail, postage, internal mail, courier, and delivery) |

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| **SPECIFIC OUTCOME 4** |

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| Liase with relevant parties and verify that reported information is in accordance with requirements. |

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| **OUTCOME NOTES** |

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| Liase with relevant parties and verify that reported information is in accordance with requirements and purpose of the report. |

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| **ASSESSMENT CRITERIA** |

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| **ASSESSMENT CRITERION 1** |

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| 1. A table is compiled listing each of the relevant recipients of the reports, a space for comments and an overall rating of the report in terms of whether it meets their information requirements and purpose. |

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| **ASSESSMENT CRITERION 2** |

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| 2. The form is distributed to recipients and their comments evaluated to determine useful of report. |

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| **ASSESSMENT CRITERION 3** |

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| 3. Possible amendments to reports are made in line with suggestions from recipients. |

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| **UNIT STANDARD ACCREDITATION AND MODERATION OPTIONS** |

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| Assessment of this Unit Standard should be contextual and practical.    Assessors must be registered as assessors with the Services SETA ETQA or an ETQA that represents the sectors in which the learner is employed.    Moderators must be registered as assessors with the Services SETA ETQA, or with an ETQA that has a Memorandum of Understanding with the Services SETA ETQA.    The mechanisms and requirements for moderation should be applied in accordance with the requirements of the relevant ETQA.    Assessment should include both formative and summative assessment.    Training providers must be accredited by the Services SETA ETQA or with an ETQA that has a Memorandum of Understanding with the Services SETA ETQA. |

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| **UNIT STANDARD DEVELOPMENTAL OUTCOME** |

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| N/A |

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| **UNIT STANDARD LINKAGES** |

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| N/A |

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| **Critical Cross-field Outcomes (CCFO):** |

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| **UNIT STANDARD CCFO IDENTIFYING** |

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| Learners are able to identify and solve problems in which responses show that responsible decisions using critical and creative thinking have been made when linking information sources to the purpose and form of the report, and when creating report templates, and when ensuring that the report meets the requirements of the full spectrum of recipients. |

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| **UNIT STANDARD CCFO WORKING** |

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| Learners are able to work effectively with others in liasing with the report recipients. |

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| **UNIT STANDARD CCFO ORGANISING** |

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| Learners are able to organise themselves and their own activities to ensure that the reports are distributed on schedule. |

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| **UNIT STANDARD CCFO COLLECTING** |

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| Learners are able to collect, organise and critically evaluate information when gathering the information required in the report and organising and collating it into the report as required by the relevant parties. |

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| **UNIT STANDARD CCFO COMMUNICATING** |

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| Learners are able to communicate effectively using visual, mathematics and language skills in the modes of oral and/or written presentations in. |

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| **UNIT STANDARD CCFO SCIENCE** |

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| The learner is able to use science and technology effectively and critically when creating templates, compiling the report and using the required distribution system to deliver the report. |

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| **UNIT STANDARD CCFO DEMONSTRATING** |

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| Learners are able to demonstrate an understanding of the world as a set of related systems by considering the needs of all relevant parties. |

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| **QUALIFICATIONS UTILISING THIS UNIT STANDARD:** |

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|  | **ID** | **QUALIFICATION TITLE** | **PRE-2009 NQF LEVEL** | **NQF LEVEL** | **STATUS** | **END DATE** | **QUALITY ASSURING BODY** |
| Core | [64069](http://allqs.saqa.org.za/showQualification.php?id=64069) | Further Education and Training Certificate: Archives and Records Management | Level 4 | NQF Level 04 | Reregistered | 2015-06-30 | ETDP SETA |
| Core | [61595](http://allqs.saqa.org.za/showQualification.php?id=61595) | Further Education and Training Certificate: Business Administration Services | Level 4 | NQF Level 04 | Reregistered | 2015-06-30 | As per Learning Programmes recorded against this Qual |
| Core | [49021](http://allqs.saqa.org.za/showQualification.php?id=49021) | Further Education and Training Certificate: Debt Recovery | Level 4 | NQF Level 04 | Reregistered | 2015-06-30 | FASSET |
| Core | [50040](http://allqs.saqa.org.za/showQualification.php?id=50040) | Further Education and Training Certificate: Optical Manufacturing Processes | Level 4 | NQF Level 04 | Reregistered | 2015-06-30 | MERSETA |
| Core | [58800](http://allqs.saqa.org.za/showQualification.php?id=58800) | Further Education and Training Certificate: Project Support Services | Level 4 | NQF Level 04 | Reregistered | 2015-06-30 | SERVICES |
| Core | [49489](http://allqs.saqa.org.za/showQualification.php?id=49489) | Further Education and Training Certificate: Road Transport Management in the Public Sector | Level 4 | NQF Level 04 | Reregistered | 2015-06-30 | TETA |
| Core | [80046](http://allqs.saqa.org.za/showQualification.php?id=80046) | National Certificate: Tactical Road Traffic Operations | Level 5 | NQF Level 05 | Reregistered | 2015-06-30 | SAS SETA |
| Core | [48888](http://allqs.saqa.org.za/showQualification.php?id=48888) | National Diploma: Hiring Operations Management | Level 5 | NQF Level 05 | Reregistered | 2015-06-30 | SERVICES |
| Core | [49087](http://allqs.saqa.org.za/showQualification.php?id=49087) | National Diploma: Orientation and Mobility Practice for Blind and Partially Sighted Persons | Level 5 | Level TBA: Pre-2009 was L5 | Passed the End Date -  Status was "Reregistered" | 2009-07-29 | ETDP SETA until Last Date for Achievement |
| Fundamental | [61591](http://allqs.saqa.org.za/showQualification.php?id=61591) | National Certificate: Information Technology: End User Computing | Level 3 | NQF Level 03 | Reregistered | 2015-06-30 | As per Learning Programmes recorded against this Qual |
| Fundamental | [49451](http://allqs.saqa.org.za/showQualification.php?id=49451) | Further Education and Training Certificate: Plastics Manufacturing | Level 4 | NQF Level 04 | Reregistered | 2015-06-30 | MERSETA |
| Fundamental | [57898](http://allqs.saqa.org.za/showQualification.php?id=57898) | Further Education and Training Certificate: Printing and Manufacture of Packaging | Level 4 | NQF Level 04 | Reregistered | 2015-06-30 | FPMSETA |
| Fundamental | [48855](http://allqs.saqa.org.za/showQualification.php?id=48855) | National Certificate: Emergency Services Operations | Level 5 | Level TBA: Pre-2009 was L5 | Passed the End Date -  Status was "Reregistered" | 2009-02-18 | Was LG SETA until Last Date for Achievement |
| Elective | [50479](http://allqs.saqa.org.za/showQualification.php?id=50479) | Further Education and Training Certificate: Advertising | Level 4 | NQF Level 04 | Reregistered | 2015-06-30 | MICTS |
| Elective | [58801](http://allqs.saqa.org.za/showQualification.php?id=58801) | Further Education and Training Certificate: Environmental Noise Practice | Level 4 | NQF Level 04 | Reregistered | 2015-06-30 | LG SETA |
| Elective | [49836](http://allqs.saqa.org.za/showQualification.php?id=49836) | Further Education and Training Certificate: Gender Practice | Level 4 | NQF Level 04 | Reregistered | 2015-06-30 | HW SETA |
| Elective | [49872](http://allqs.saqa.org.za/showQualification.php?id=49872) | Further Education and Training Certificate: Victim Empowerment Co-ordination | Level 4 | NQF Level 04 | Reregistered | 2015-06-30 | HW SETA |