Unit Title:	**Principles of providing administrative services**	
OCR unit number	202	
Sector unit number	TC2-2	
Level:	2	
Credit value:	4	
Guided learning hours:	32	

Unit purpose and aim

This unit is about the knowledge and understanding needed to complete core administrative tasks in a business environment, including using office equipment, handling mail, using telephone equipment, minimising waste, providing reception services and effective customer service.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
The Learner will:	**The Learner can:**	
1 Understand how to make and receive telephone calls	1.1 Describe the different features of telephone systems and how to use them	1.1 For example • call holding • call waiting • re-directing calls • answer phones • teleconferencing • text messaging
	1.2 Describe how to follow organisational procedures when making and receiving telephone calls	1.2 For example when making calls • where to locate the correct name and telephone number and extension • the purpose of the call and how to use the functions of the telephone. When receiving calls • answering the telephone according to the organisational procedure • how to use the

			functions of the telephone in order to deal with the caller effectively
			• how to take messages
			• identifying the person when transferring the call and passing on information
		1.3 Explain the purpose of giving a positive image of self and own organisation	1.3 For example the purpose of giving a positive image of self and own organisation can include to attract and retain customers, ensure customer satisfaction etc
2	Understand how to handle mail	2.1 Explain the purpose of correctly receiving, checking and sorting incoming and outgoing mail or packages	2.1 For example to ensure that mail and packages are directed to the appropriate person
		2.2 Identify different internal and external mail services available to organisations	2.2 internal mail services includes: • transferring mail between different locations within the organisation • using internal envelopes for circulating mail internally external mail services includes: • recorded delivery • special delivery • courier services.
		2.3 Describe the methods of calculating postage charges for mail or packages	2.3 The methods of calculating postage charges for mail or packages may include: • using a franking machine • weighing and measuring mail • using service providers information to work out charges

3	Understand how to use different types of office equipment	3.1	Identify different types of equipment and their uses	3.1	The different types of equipment and their uses may include:
					• computers and printers for preparing and printing office documents
					• photocopiers for copying office documents
					• communication equipment for sending emails, text messages, faxes, making and receiving telephone calls
					• shredding machines for destroying office documents
		3.2	Explain the purpose of following manufacturer's instructions when using equipment	3.2	For example following manufacturer's instructions to ensure that the equipment is used safely and correctly
		3.3	Explain the purpose of keeping equipment clean, hygienic and ready for the next user	3.3	For example so that the equipment is in full working order for the next person to use it safely
4	Understand how to keep waste to a minimum in a business environment	4.1	Explain why waste should be kept to a minimum in a business environment	4.1	Why waste should be kept to a minimum in a business environment may include financial reasons (eg reducing costs/spending) and environmental reasons (eg avoiding unnecessary costs to the environment, landfill material etc)
		4.2	Identify the main causes of waste that may occur in a business environment	4.2	For example
					• Resources such as paper, toners and inks
					• Energy through heating, lighting and powering equipment
		4.3	Identify ways of keeping waste to a minimum in a business environment	4.3	Ways of keeping waste to a minimum in a business environment may include:
					• turning off power switches at the end of

		the day
		• turning off lights when a room is not in use
		• emailing where possible instead of sending paper copy through the post
		• recycling paperclips, folders etc
		• using a recycling service for paper waste
5 Know how to make arrangements for meetings	5.1 Identify different types of meetings and their main features	5.1 Different types of meetings and their main features include: • team meetings • training meetings • appraisal meetings • web meetings The features of these meeting may include for example • Following the agenda • review of the minutes • note taking • resources required such as supporting documentation, equipment and refreshments
	5.2 Identify the sources and types of information needed to arrange a meeting	5.2 Sources of information may include • the individual/s requesting the meeting • other colleagues • organisational procedures for arranging a meeting The type of information needed to arrange a meeting may include • the reason for the meeting • the time, length, date and location • what resources are required • a list of required attendees and their

		contact details
	5.3 Describe how to arrange meetings	5.3 How to arrange meetings includes • check delegate details • check the time, date, venue and what resources are required • check whether any refreshments are required • check whether any information needs to be circulated prior to the event (eg previous minutes, agenda, briefing information etc) • book a suitable venue and any equipment, resources and refreshments that may be required • invite all required attendees confirming time date, location any information they may need to bring and requesting any dietary requirements
6 Understand procedures for organising travel and accommodation arrangements	6.1 Explain the purpose of confirming instructions and requirements for business travel and accommodation	6.1 For example to ensure that the individual arrives on time for the appointment
	6.2 Outline the main types of business travel or accommodation arrangements that may need to be made and the procedures to follow	6.2 For example this may include: • booking train and plane tickets, hotel rooms, car and taxi hire • organisational procedures for making travel and accommodation arrangements
	6.3 Explain the purpose of keeping records of business travel or accommodation arrangements	6.3 For example to be able to make the same or similar arrangements in the future

7	Understand diary management procedures	7.1 Explain the purpose of using a diary system to plan activities	7.1 For example to ensure that activities are correctly co-ordinated
		7.2 Identify the information needed to maintain a diary system	7.2 the information needed to maintain a diary system includes • the correct times, dates and duration of any activities • annual leave is recorded for those people whose diary is being maintained • important events are scheduled first
8	Understand the purpose of delivering effective customer service and how to do so	8.1 Contrast the differences between internal and external customers in a business environment	8.1 The differences between internal and external customers in a business environment may include things such as: • Needs • Expectations • Communication channels Internal customers are other colleagues and departments within the same organisation and external customers are those looking to buy or pay for a service or product from an organisation.
		8.2 Explain why customer service should meet or exceed customer expectations	8.2 Why customer service should meet or exceed customer expectations includes for example: • To protect and maintain the organisation's reputation • in order to attract repeat business and new business through recommendations from those customers
		8.3 Identify the purpose and ways of building positive relationships with customers	8.3 For example by meeting or exceeding customer expectations

		8.4 Identify how customers demonstrate their own needs and expectations	8.4 how customers demonstrate their own needs and expectations includes things such as: • asking questions about particular products or services • making comparisons with other products or services
9	Understand the purpose of reception services and how to follow reception procedures	9.1 Describe the purpose of the receptionist role as the first point of contact between the public/client and an organisation	9.1 For example to create an excellent first impression of themselves and the organisation
		9.2 Explain how to present a positive image of self and the organisation and the purpose of doing so	9.2 How to present a positive image of self and the organisation may include: • appearance • body language • responsiveness to customers and colleagues
		9.3 Explain how to carry out entry, departure, security and confidentiality procedures in a reception area	9.3 How to carry out entry, departure, security and confidentiality procedures in a reception area includes • maintaining visitor records • Issuing and retrieving identity badges • Keeping confidential information secure • Accompanying visitors • Maintaining the safety of visitors whilst on site

Assessment

Assessment will consist of an on-line multiple-choice test. All tests are available on demand.

The test for this unit will be 45 minutes in length and consist of 30 questions. Results will be graded pass or fail.

The grade achieved will be stated on the certificate.

Guidance on assessment and evidence requirements

This unit is assessed via an on demand on-screen multiple-choice test, set and marked by OCR.

Each test will consist of multiple-choice questions which will test candidates' knowledge and understanding across the Learning Outcomes and associated Assessment Criteria. Candidates will be required to have knowledge and understanding of all Assessment Criteria within the unit, as all Assessment Criteria will be covered within any one test.

A number of multiple-choice question types may be used. These could include: closed questions; statements for completion; multiple response questions; true/false questions or ordering questions (including a maximum of 4 steps).

(Please refer to the *Principles of Business and Administration Centre Handbook* for further guidance regarding each type of question).

Centres should refer to the *'OCR Administrative Guide to Vocational Qualifications (A850)'* for Notes on Preventing Computer-Assisted Malpractice.

National Occupational Standards (NOS) mapping/signposting

NOS can viewed on the relevant Sector Skills Council's website or the Occupational standards directory at www.ukstandards.co.uk.

Occupational standards	Unit number	Title
Business And Administration NOS	219	Use a telephone system
Business And Administration NOS	104	Handle Mail
Business And Administration NOS	109	Use Office Equipment
Business And Administration NOS	220	Operate Office Equipment
Business And Administration NOS	202	Work within your business environment
Business And Administration NOS	211	Organise and Support Meetings
Business And Administration NOS	204	Manage Diary systems

Functional skills signposting

This section indicates where candidates may have an opportunity to develop their functional skills.

Link to functional skills standards http://www.qcda.gov.uk/15565.aspx

Functional Skills Standards					
English		**Mathematics**		**ICT**	
Speaking and Listening	✐	Representing		Use ICT systems	✐
Reading	✐	Analysing		Find and select information	✐
Writing	✐	Interpreting		Develop, present and communicate information	

Resources

Equipment: In order to deliver the on-line test for this unit, centres will require the minimum hardware stipulated in the OCR document *Minimum Hardware Requirements*. This document is available for downloading from the E-assessment area of the *Business and Administration* website (www.ocr.org.uk).

OCR does not stipulate the mode of delivery for the teaching of the content of this unit. Centres are free to deliver this unit using any mode of delivery that meets the needs of their candidates. Centres should consider the candidates' complete learning experience when designing learning programmes.

Additional information

The *OCR Business and Administration Centre Handbook* contains important information for anyone delivering, working towards or involved with the OCR Business and Administration qualifications, of which this unit forms a part. This can be downloaded from OCR's website www.ocr.org.uk.

For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications' (A850)* on the OCR website www.ocr.org.uk .

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