

Cambridge TECHNICALS LEVEL 2  
***BUSINESS***  
***ADMINISTRATION***

Cambridge  
TECHNICALS  
2016

Unit 4

Provide administrative support

T/615/5464

Guided learning hours: 60

Version 1 September 2018

## LEVEL 2

### UNIT 4: Provide administrative support

T/615/5464

Guided learning hours: 60

Essential resources required for this unit: None

**Assessment: This unit is internally assessed by the centre and externally moderated by OCR.**

#### UNIT AIM

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This unit aims to develop some of the essential skills and knowledge needed in an administrative role in business. You will develop your skills in, and understanding of, different administrative processes including maintaining office equipment, ordering and issuing stationery and supplies and managing incoming and outgoing mail.

The unit also aims to develop key administrative skills that will enable you to effectively organise business travel and accommodation for colleagues and to manage and co-ordinate the diaries of others using different diary systems.

## TEACHING CONTENT

The unit content describes what has to be taught to ensure that learners are able to access the highest grade.

Anything which follows an i.e. details what must be taught as part of that area of content.

Anything which follows an e.g. is illustrative, it should be noted that where e.g. is used, learners must know and be able to apply relevant examples to their work though these do not need to be the same ones specified in the unit content.

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
<p>1. Be able to maintain office equipment</p>	<p>1.1 How to deal with issues that may occur when using office equipment i.e.</p> <ul style="list-style-type: none"> <li>• refer to the manufacturer's instructions guide (e.g. troubleshooting section for issues such as non-printing of documents sent to the printer)</li> <li>• replenish supplies (e.g. replacing paper, toner, ink, only ordering as much as can be stored, ordering sufficient for use, ordering supplies within budget constraints)</li> <li>• clean equipment or contact relevant contractor to do so</li> <li>• when to contact the servicing company and how to do so</li> </ul> <p>1.2 How to keep business waste to a minimum i.e.</p> <ul style="list-style-type: none"> <li>• switch off office equipment overnight</li> <li>• use power-save modes where possible</li> <li>• allocate printing credits to individuals so only essential printing/copying is completed</li> <li>• easy access to recycling waste bins</li> <li>• order the appropriate stock (e.g. to fit storage space, avoid over-ordering, awareness of seasonal items, competitive pricing)</li> </ul> <p>1.3 How to comply with health and safety requirements when using office equipment i.e.</p> <ul style="list-style-type: none"> <li>• refer to manufacturer's guidance</li> <li>• only use equipment that has a current Portable Appliance Testing (PAT) certificate</li> <li>• correct manual handling of office equipment in order to prevent personal injuries</li> <li>• report hazards relating to office equipment</li> </ul>
<p>2. Be able to order, maintain and issue stationery and supplies</p>	<p>2.1 How to carry out a stock check of stationery and office supplies i.e.</p> <ul style="list-style-type: none"> <li>• identify frequency of stock check</li> <li>• identify personnel involved in the stock check</li> <li>• identify the required minimum stock levels in advance</li> <li>• ensure all stock locations are clearly labelled and being correctly used</li> <li>• tools needed to complete the stock check (e.g. stock spreadsheet)</li> </ul>

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
	<p>2.2 How to order and maintain up-to-date stock i.e.</p> <ul style="list-style-type: none"> <li>• understanding the process for ordering stock (e.g. how often stock is ordered)</li> <li>• completing a business stock order (e.g. how to complete it, who will authorise it, using the correct forms, following company and supplier processes)</li> <li>• the factors to consider when ordering stock (e.g. budget/cost, time of year (e.g. seasonal items), urgency, unexpected high usage, different suppliers, cost, delivery time)</li> </ul> <p>2.3 How and when to contact the suppliers when issues with stock occur i.e.</p> <ul style="list-style-type: none"> <li>• knowing types of issues that may occur (e.g. late or non-delivery, incorrect delivery, damaged or unwanted stock)</li> <li>• methods for contacting the supplier (e.g. when to make contact yourself, when to escalate, when to phone (e.g. if urgent), when to email)</li> <li>• ensuring specific order information is available (e.g. order number, items ordered, quantity of items, type of delivery)</li> </ul>
3. Be able to organise business travel and accommodation for colleagues	<p>3.1 How to initiate arrangements for business travel and accommodation i.e.</p> <ul style="list-style-type: none"> <li>• obtain travel requirements from colleague(s)</li> <li>• methods of logging the requirements</li> <li>• confirm budgetary constraints</li> </ul> <p>3.2 How to research business travel requirements and accommodation i.e.</p> <ul style="list-style-type: none"> <li>• make enquiries into the availability of transport and accommodation</li> <li>• use appropriate types of office equipment to complete tasks (e.g. telephone, voicemail systems, computer, tablet, photocopier)</li> <li>• research any required travel documentation (e.g. location of accommodation, maps, train times, Visas, flight times, foreign currency)</li> <li>• identify travel and accommodation appropriate to requirements and budget</li> </ul> <p>3.3 How to book and confirm travel and accommodation requirements i.e.</p> <ul style="list-style-type: none"> <li>• use appropriate channels to book required travel and accommodation (e.g. rail websites, hotel booking lines)</li> <li>• use appropriate payment methods (e.g. company credit card, other authorised methods)</li> <li>• confirm arrangements with colleague(s)</li> <li>• provide confirmed details to colleagues using appropriate methods (e.g. paper-based or electronic)</li> </ul>

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
<p>4. Be able to manage diaries and diary systems</p>	<p>4.1 Understand different diary systems used in a business (e.g. electronic diary systems, online diaries and paper diaries)</p> <p>4.2 How to keep and maintain diary systems for individuals i.e.</p> <ul style="list-style-type: none"> <li>• ensuring accuracy of entries made</li> <li>• responding to changes in a timely manner</li> <li>• communicating with all relevant parties involved</li> <li>• adhering to confidentiality requirements (e.g. keeping personal/sensitive information confidential, data protection legislation requirements)</li> <li>• negotiating events or arrangements</li> <li>• recording and confirming arrangements</li> <li>• reporting the impact of changes to relevant stakeholders</li> </ul> <p>4.3 Managing the constraints of diary systems i.e.</p> <ul style="list-style-type: none"> <li>• managing multiple diaries for individuals</li> <li>• managing different diary systems (e.g. paper and/or online diaries)</li> <li>• co-ordinating individuals for meetings (e.g. planning ahead where possible)</li> <li>• coping with diary systems that are not updated</li> </ul>
<p>5. Be able to manage incoming and outgoing mail</p>	<p>5.1 How to sort, organise and distribute incoming mail i.e.</p> <ul style="list-style-type: none"> <li>• types of mail (e.g. email, letters, parcels, junk mail, spam)</li> <li>• filtering mail for colleagues (e.g. filtering paper-based mail for junk mailshots, filtering emails for spam)</li> <li>• sorting into team mailboxes (e.g. forwarding emails to relevant team mailbox/individuals, ordering paper-based mail for distribution to team in-boxes/individuals)</li> </ul> <p>5.2 How to dispatch outgoing mail considering the best option for the mail and the business i.e.</p> <ul style="list-style-type: none"> <li>• by post or by email</li> <li>• considering urgency, size, value, cost</li> </ul>

## GRADING CRITERIA

LO	Pass	Merit	Distinction
The learner will:	The assessment criteria are the Pass requirements for this unit.	To achieve a Merit the evidence must show that, in addition to the Pass criteria, the candidate is able to:	To achieve a Distinction the evidence must show that, in addition to the Pass and Merit criteria, the candidate is able to:
1. Be able to maintain office equipment	P1: Demonstrate how to maintain office equipment	M1: Complete the process for reporting an office equipment maintenance issue	D1: Make recommendations for keeping office waste to a minimum
	P2: Comply with health and safety requirements when using office equipment		
	P3: Report a hazard or issue relating to a specific piece of office equipment		
2. Be able to order, maintain and issue stationery and supplies	P4: Complete a stock check		
	P5: Order and issue stock for use in an office, incorporating all key factors for consideration	M2: Contact the supplier to resolve issues with stock	
3. Be able to organise business travel and accommodation for colleagues	P6: Obtain and log all relevant travel requirements for a colleague	M3: Obtain and log all relevant travel requirements for a number of colleagues with different requirements	
	P7: Research and identify the options for all relevant travel and accommodation requirements for a colleague	M4: Research and identify the options for all relevant travel and accommodation requirements for a number of colleagues with different requirements	D2: Make recommendations regarding travel and accommodation to colleagues, including contingency arrangements, providing justification for your recommendations

LO	Pass	Merit	Distinction
	P8: Confirm and book business travel and accommodation requirements for a colleague	M5: Confirm and book business travel and accommodation requirements for a number of colleagues with different requirements	D3: Create a procedure for obtaining, logging, booking and confirming the travel and accommodation requirements of colleagues
4. Be able to manage diaries and diary systems	P9: Use and maintain different business diary systems for individuals effectively	M6: Manage the diaries of several colleagues in order to book an event	D4: Negotiate diary entries with others to ensure that diaries of required colleagues can be co-ordinated for a specific event
5. Be able to manage incoming and outgoing mail	P10: Sort, distribute and organise incoming mail in a business, using the most appropriate option		
	P11: Dispatch outgoing mail using the most appropriate option		

## ASSESSMENT GUIDANCE

It is important for learners to have the opportunity to learn and apply their knowledge and skills to meaningful substantial tasks, in order to successfully achieve the unit.

Feedback to learners: you can discuss work-in-progress towards summative assessment with learners to make sure it's being done in a planned and timely manner. It also provides an opportunity for you to check the authenticity of the work. You must intervene if you feel there's a health and safety risk.

Learners should use their own words when producing evidence of their knowledge and understanding. When learners use their own words it reduces the possibility of learners' work being identified as plagiarised. If a learner does use someone else's words and ideas in their work, they must acknowledge it, and this is done through referencing. Just quoting and referencing someone else's work will not show that the learner knows or understands it. It has to be clear in the work how the learner is using the material they have referenced **to inform their** thoughts, ideas or conclusions.

For more information about internal assessment, including feedback, authentication and plagiarism, see the centre handbook. Information about how to reference is in the OCR *Guide to Referencing* available on our website: <http://www.ocr.org.uk/i-want-to/skills-guides/>.

In order to meet Grading Criteria **P2**, learners must evidence that they understand health and safety requirements **and** can comply with them. For example, they may evidence correct manual handling when moving heavy items, or check that an electric item has a current PAT test notification.

Centres may need to simulate a hazard or issue for learners to identify and report in order to meet **P3**, if one is not naturally occurring. Where a hazard is simulated, teachers should ensure that all learners in the same cohort do not have to identify the same hazard.

A simulated environment may be provided in order for learners to meet Grading Criteria **P5** (*order and issue stock*) if a stock check situation is not naturally occurring. Centres should ensure that some stock is at zero level, some below the required level, some at the correct level and some is overstocked. It is recommended that this relates to a situation where there is no **formal** requirement to keep **specific** stock e.g. an office stationery cupboard.

In order to meet Grading Criteria **P5** and **M2** learners must evidence that they know who to contact for differing items of stock. In addition, to meet **M2**, learners must also evidence the most appropriate form of contact to use (e.g. phone call if the stock issue is urgent, email if less urgent) and that they know when and how to escalate an issue to a manager if there is difficulty resolving it directly.

A simulated environment may be used for **M2**, however, if this is the case, centres should ensure that the issue is changed for different learners from the same cohort. Meeting **M2** will also require learners to use communication skills effectively.

The term **colleague**, relating to the grading criteria for **Learning Outcome 3** (*organise travel and accommodation*) can mean an internal colleague or external customer (e.g. a consultant working on behalf of the business).

This learning outcome allows learners to evidence their ability to use a range of office equipment effectively. Learners will need to use a range of equipment such as a computer, tablet, printer and photocopier, when logging, researching, booking and sharing the travel and accommodation information.

Grading Criteria **M3** and **M4** require the learner to be acting on behalf of **a number of colleagues** with different requirements. There should be **a minimum of three** different colleagues. The colleagues may be all internal colleagues, all external customers or a combination of the two. Examples of **different requirements** may be all colleagues attending the same conference but living in different parts of the country and, therefore, having different travel/accommodation requirements or different colleagues attending different meetings, with individual travel and/or accommodation requirements.

To meet **P7** and **M4**, learners should research options and provide their colleague/s with the choices. However, to meet Grading Criteria **D2** learners must make recommendations to their colleagues, fully justifying their recommendations and detailing any contingency plans. For example, they may recommend a specific hotel for overnight accommodation as it is within 5 minutes' walk of the meeting venue, meaning that additional travel between venues would not be required. As a contingency, they may provide details of a local taxi company that could take the colleague from the hotel to the venue, and be able to provide an approximate cost for the taxi journey should it be required.

In order to meet **P8** and **M5**, learners should complete any necessary confirmation documents/booking forms.

Grading Criteria **P9** requires learners to use and maintain diaries for individual colleagues. **M6** requires them to co-ordinate the diaries of several colleagues in order to book an event that they will all attend. In order to meet **D4**, learners must negotiate with others to ensure that diaries of required colleagues can be co-ordinated for an event. For example, this may require them to negotiate with one or more of the colleagues, or other colleagues within



a business, to amend an existing meeting in order to free up a 'best-fit' timeslot. Alternatively, they may negotiate over a room booking, for example, if they need a larger capacity room that has already been booked by someone else.

Evidence for particular assessment criteria could be witnessed with the learner demonstrating their ability and fulfilling the role of an administration assistant in a variety of different business situations. Any witness statements must be completed by the assessor. A witness statement on its own may not provide sufficient evidence unless it contains a detailed description of the learner's performance with clear reference to the grading criteria.

## SYNOPTIC ASSESSMENT

Synoptic assessment is a feature of this qualification and it requires learners to use an appropriate selection of their skills, knowledge and understanding, acquired through all of the units that make up their qualification, in an integrated way and apply them to a key task or tasks.

This helps learners to develop their appreciation and understanding of the connections between the different elements of learning in this qualification to help make their curriculum meaningful and better prepare them for employment in the Business Administration sector, please see section 6 of the centre handbook for more detail.

Links between this unit and other units:

Specific LO from this unit	Name of other unit and related LO
LO1 Be able to maintain office equipment	Unit 1 Principles of working in service sector organisations LO1, LO2
LO2 Be able to order, maintain and issue stationery and supplies	Unit 6 Communicate in a business environment LO2
LO3 Be able to organise business travel and accommodation for colleagues	Unit 1 Principles of working in service sector organisations LO6 Unit 2 Understand the needs and expectations of customers LO2, LO4 Unit 6 Communicate in a business environment LO1, LO2 and LO3 Unit 7 Support the organisation of an event LO3

## MEANINGFUL EMPLOYER INVOLVEMENT - A REQUIREMENT FOR TECHNICAL CERTIFICATE QUALIFICATIONS

The minimum amount of employer involvement must relate to at least one or more of the elements of the mandatory content. This unit is mandatory in the Level 2 Cambridge Technical Diploma in Business Administration.

This qualification has been designed to be recognised as a Technical Certificate in performance tables in England. It is a requirement of this qualification for centres to secure employer involvement through delivery and/or assessment of this qualification for every learner.

Eligible activities and suggestions/ideas that may help you in securing meaningful employer involvement for this unit are given in the table below.

Please refer to the Qualification Handbook for further information including a list of activities that are not considered to meet this requirement.

### Meaningful employer involvement

It is recommended that learners undertake structured work-experience or work-placements that develop skills and knowledge relevant to this unit.

They may also benefit from industry professionals visiting the centre to act as guest speakers.

You can find further information on employer involvement in the delivery of qualifications in the following documents:

- [Employer involvement in the delivery and assessment of vocational qualifications](#)
- [DfE work experience guidance](#).

**ocr.org.uk/business**

OCR customer contact centre

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