



Unit Title: Technical Advice and Guidance

OCR unit number: 25
 Level: 2
 Credit value: 9
 Guided learning hours: 50
 Unit reference number: F/601/3506

Candidates undertaking this unit must complete real work activities in a work environment. Simulation is only allowed in exceptional circumstances (please refer to the centre handbook for further details).

Unit purpose and aim

This unit covers basic knowledge of how to provide technical advice and guidance and practical application of this knowledge in providing reactive advice and guidance.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p>The Learner will:</p> <p>1 Know how to provide technical advice and guidance</p>	<p>The Learner can:</p> <p>1.1 Identify how technical advice and guidance can be used</p> <p>1.2 List the types of information which can form the basis of technical advice and guidance</p> <p>1.3 Identify organisational procedures which can apply to the provision of technical advice and guidance</p> <p>1.4 Identify circumstances where technical advice and guidance should be provided proactively rather than reactively in response to customer requests (e.g. to rectify known faults, to provide new functionality)</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> • why advice and guidance is required, how it can be applied and who the end users are • how to identify what technical information they will require in order to deliver effective advice and guidance • the different types of information to include: <ul style="list-style-type: none"> - reference sources eg manuals, manufacturers guides and specifications - analysis of data eg fault logs, trend analysis - online eg manufacturer’s websites, technical fora, discussions groups - interview of/feedback from customers - work manuals/logs/procedures - advice from peers/supervisors/line managers • the different methods used for providing information within an organisation. This may include written and/or verbal, direct and/or indirect methods. They should know when and why different methods are used • how to ensure that the content is suitable

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
		<p>with respect to content, accuracy and currency</p> <ul style="list-style-type: none"> • what the organisational policies are and whether the content would be acceptable • the advantages of acting proactively when working with technology as opposed to acting reactively
<p>2 Provide reactive technical advice and guidance to customers on a range of topics</p>	<p>2.1 Identify the purposes for which technical advice and guidance is required</p> <p>2.2 Check that customers are entitled to receive the requested technical advice and guidance</p> <p>2.3 Communicate effectively with customers to obtain specified information to enable correct technical advice and guidance to be provided</p> <p>2.4 Interpret given technical information to produce advice and guidance in response to customer requests</p> <p>2.5 Communicate technical advice and guidance to customers in a given format and style, confirming customer understanding of the information provided</p> <p>2.6 Follow organisational procedures for responding to customer requests including the timely escalation of those for which technical advice and guidance can not be provided or does not resolve the request</p>	<p>Candidates must have an understanding of:</p> <ul style="list-style-type: none"> • the reasons why technical advice and guidance is required eg to rectify a fault, to provide guidance on how to use software/hardware • the need to confirm that a customer is eligible to receive technical advice and guidance to include: <ul style="list-style-type: none"> - the purpose of confirming eligibility - the procedures for confirming eligibility - risks involved if eligibility is not confirmed • the different methods used to communicate with customers and situations when they are most effective to include verbal and written communication • how to interpret technical information and where to access support/guidance if required • how to communicate technical advice and guidance to different customer types eg technical and non-technical, local, national, written, verbal • the organisational procedures for their organisation to include: <ul style="list-style-type: none"> - documentation including audit trail - escalation and limits of responsibility - information sources - communicating with customers including progress reports - fault diagnosis

Assessment

Candidates undertaking this unit must complete real work activities in order to produce evidence to demonstrate they are occupationally competent. Real work is where the candidate is engaged in activities that contribute to the aims of the organisation by whom they are employed, for example in paid employment or working in a voluntary capacity.

Simulation is only allowed for aspects of units when a candidate is required to complete a work activity that does not occur on a regular basis and therefore opportunities to complete a particular work activity do not easily arise. When simulation is used, assessors must be confident that the simulation replicates the workplace to such an extent that candidates will be able to fully transfer their occupational competence to the workplace and real situations.

Internal quality assurance personnel must agree the use of simulated activities before they take place and must sample all evidence produced through simulated activities.

It is the assessor's role to satisfy themselves that evidence is available for all performance, knowledge and evidence requirements before they can decide that a candidate has finished a unit. Where performance and knowledge requirements allow evidence to be generated by other methods, for example by questioning the candidate, assessors must be satisfied that the candidate will be competent under these conditions or in these types of situations in the workplace in the future. Evidence of questions must include a written account of the question and the candidate's response. Observations and/or witness testimonies must be detailed and put the evidence into context ie the purpose of the work etc.

All of the assessment criteria in the unit must be achieved and clearly evidenced in the submitted work, which is externally assessed by OCR.

Evidence for the knowledge must be explicitly presented and not implied through other forms of evidence.

Evidence requirements

All aspects of the assessment criteria must be covered and evidence must be available that shows where and how the assessment objectives have been achieved.

Assessment Criterion 1

The candidate is required to produce written evidence for the following:

- identify the different ways technical advice and guidance can be used giving examples of why it would be required and who the end user would be
- List the different types of information that can be used in order to support the technical advice and guidance that they may be required to give
- Identify the procedures used by their organisation when providing technical advice and guidance
- Identify situations when technical advice and guidance should be provided proactively as opposed to reactively.

The candidate could provide evidence from advice and guidance situations that they have been involved with to support their evidence.

Assessment Criterion 2

The candidate is required to provide evidence of providing technical advice and guidance to a range of customers (these can be internal or external to their organisation) requiring different technical advice and guidance. The evidence must include:

- An explanation of:
 - who the customer is and the purpose of their request
 - how they confirmed the eligibility of the customer
 - the method used to communicate with the customer in order to obtain the required information and why this method was appropriate
 - how the information was interpreted in order to provide appropriate advice and guidance to the customers
 - the method used to communicate the technical advice and guidance to the customer and why this was appropriate
 - the organisational procedures followed
- Candidate evidence should be supported by a detailed witness testimony or assessor observation if supporting workplace documentation is not available

Candidates are encouraged to choose activities which will allow them to cover all or a majority of the criteria at one time. It is not necessary to use different activities for each element of the criterion.

Guidance on assessment and evidence requirements

Evidence can reflect how the candidate carried out the process or it can be the product of a candidate's work or a product relating to the candidate's competence.

For example: The process that the candidate carries out could be recorded in a detailed personal statement or witness testimony. It is the assessor's responsibility to make sure that the evidence a candidate submits for assessment meets the requirements of the unit.

Questioning the candidate is normally an ongoing part of the assessment process, and is necessary to:

- test a candidate's knowledge of facts and procedures
- check if a candidate understands principles and theories *and*
- collect information on the type and purpose of the processes a candidate has gone through.
- candidate responses must be recorded

It is difficult to give a detailed answer to how much evidence is required as it depends on the type of evidence collected and the judgement of assessors. The main principles, however, are as follows: for a candidate to be judged competent in a unit, the evidence presented must satisfy:

- all the items listed, in the section 'Learning Outcomes'
- all the areas in the section 'Assessment Criteria'

The quality and breadth of evidence provided should determine whether an assessor is confident that a candidate is competent or not. Assessors must be convinced that candidates working on their own can work independently to the required standard.

Additional information

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 .