Programme Module

Office Procedures

leading to

Level 3 QQI Component: Office Procedures 3N0888

Please note the following prior to using this programme module descriptor:

- This programme module can be delivered as a stand alone module or as part of the:

    1. **Level 3 QQI Certificate in General Learning 3M0874**
    2. **Level 3 QQI Certificate in Employability Skills 3M0935**
    3. **Level 3 QQI Certificate in Information and Communication Technologies 3M0877.**

- Upon successful completion of this programme module the learner will achieve 10 credits towards the Level 3 QQI Certificates in General Learning, Employability Skills or Information and Communication Technologies.

- The learner needs to accumulate a minimum of 60 credits in order to achieve the Level 3 QQI Certificates in General Learning or Employability Skills or Information and Communication Technologies.

- Teachers/tutors should familiarise themselves with the information contained in CDETB's programme descriptor for Everyday Living Skills, Skills for the Workplace or Introduction to Information and Communication Technologies prior to delivering this programme module.

- In delivering this programme module teachers/tutors will deliver class content in line with the Guidelines for Teaching and Learning included in this programme module.

- In assessing the learner, teachers/tutors will assess according to the information included in this programme module. Teachers/tutors are required to devise Assessment Brief/s for the Collection of Work and Skills Demonstration.

- Where overlap is identified between the content of this programme module and one or more other programme module(s), teachers/tutors are encouraged to integrate the delivery of this content.

- Where there is an opportunity to facilitate the learner to produce one piece of assessment evidence which demonstrates the learning outcomes from more than one programme module, teachers/tutors are encouraged to integrate assessment.

Overview of the Programme Module

The Programme Module is structured as follows:

Section 1 to 8: contains important information for the teacher/tutor about the credit value, title, code, etc. of the programme module.

Section 9: details the learning outcomes prescribed for the programme module by QQI. These outcomes are set by QQI and cannot be changed in any way by the CDETB or individual teachers/tutors.

Section 10: outlines suggestions and guidelines for teaching the module. It contains useful information and ideas for teachers/tutors and can be helpful in clarifying learning outcomes.

Section 11: contains the relevant information in relation to the assessment of the module. As the teacher/tutor is the assessor of the work, this section is essential reading.

Section 11a specifically prescribes the way in which learners are required to present evidence for assessment.

Learner Marking Sheet: this is the marking sheet that must be attached to the assessment portfolio and signed by the teacher/tutor and the learner.

Programme Module		Award	
1. Title of Programme Module Office Procedures		**2. Component Name and Code** Level 3 Office Procedures 3N0888	
3. Duration in Hours of Programme Module 100		**4. Credit Value** 10	
5. Assessment Technique Collection of Work 50% Skills Demonstration 50%		**6. Specific Requirements** None	

7. Aims of the Programme Module

This programme module aims to provide the learner with the tools necessary to work in an office environment, under supervision and in a confident and efficient manner.

8. Objectives:

- to provide an opportunity for the learner to work in an office environment and to practise general office duties in that environment
- to facilitate the learner to apply appropriate health, safety and personal hygiene procedures when working in an office environment
- to introduce the learner to the equipment and software applications commonly used in an office environment
- to learn about working as part of a team and communicating appropriately with others through the usual types of office interactions; one to one, group, on the phone, by e-mail and at reception.

9. Learning Outcomes of Level 3 Office Procedures 3N0888

The learner will be able to:

1. outline the formal structures or departments commonly found in a large organisation
2. describe equipment and software packages commonly used in an office environment
3. outline the primary means of receiving, sourcing, recording, managing and circulating business related information and documentation
4. describe contracts of employment, including permanent, temporary and fixed term contracts
5. demonstrate an understanding of the importance of confidentiality in an office
6. prepare a variety of physical documentation for circulation including photocopying back to back, reducing and increasing size, collating, binding and stapling
7. carry out a broad range of general reception duties including making and receiving telephone calls, receiving visitors
8. maintain a petty cash float
9. communicate efficiently, noting messages concisely and conveying accurately to relevant person
10. demonstrate the application of communications, team working and quality awareness in an office environment
11. apply appropriate health, safety and personal hygiene procedures when working in an office environment.

Delivery Strategies and Learning Activities

The programme module could be delivered through classroom-based learning activities, team work, group discussions, one-to-one tutorials, field trips, case studies, role play and other relevant activities. The development of team working skills and effective communications skills should be integrated where possible in the delivery of this module. The application of these skills must be demonstrated in the Collection of Work/Skills Demonstrations. There are practical elements to this module requiring access to a range of materials, resources and equipment and the learner should be allocated adequate time and facilities to complete each task. All practical activities should exemplify safe working practices and reinforce standard health, safety and environmental concerns.

10. Teaching and Learning Guidelines

Please note: the following guidelines suggest a sequence for the teaching of this module. In some cases, this may differ from the sequence of learning outcomes outlined in section 9.

Unit 1: Learning About the Office Environment

Introduction

Brainstorm with the learner the names of some big organisations commonly heard of, for example, Apple, Microsoft, Dell, Coca Cola, Proctor and Gamble, Smurfit, Bank of Ireland, Allied Irish Bank, Ryan Air, Aer Lingus, Dunnes Stores, Tesco, Lidl, others of interest to the learner.

Organisational structures and departments

Learning Outcome 1: Outline the formal structures or departments commonly found in a large organisation.

*In order to help the learner achieve **Learning Outcome 1** in particular, consider doing the following:*

- explore with the learner the many types of activities that large organisations engage in and how these activities can be managed efficiently through the use of departments, for example,
  - The Accounting Department:
    - managing the finances of the organisation
    - paying the invoices received from the suppliers of goods and/or services
    - sending invoices to debtors for goods and/or services provided by the organisation
    - salaries/payroll of staff
  - The Human Resources (HR) Department:
    - recruiting new staff – advertising positions, organising interviews, agreeing contracts of employment
    - co-ordinating/providing training for employees of the organisation
    - appraising the performance of employees
    - maintaining employee records
    - terminating the contract of employees
    - providing services for employees, for example, providing a reference for an employee, dealing with queries on pensions, pay scales, maternity leave, annual leave, parental leave
  - The Marketing Department:
    - undertaking market research
    - monitoring customer's needs and opinions
    - advertising goods and/or services
    - promoting the organisation
  - The I.T. Department:
    - looking after the computers and related equipment used by the employees in the organisation
    - installing new hardware and software

- planning how new technology can benefit the organisation
- ensuring the I.T. systems used are efficient and that they protect the organisation from cyber attack

o The Research and Development (R&D) Department:

- researching openings for new products and/or services or improvements to existing products and/or services
- ensuring compliance with safety regulations and the law
- developing new products

o The Legal Department:

- providing legal advice and guidance to the organisation
- representing the organisation in legal matters
- wording for publications produced by the organisation

o Other Departments.

Office Software

Learning Outcome 2: Describe equipment and software packages commonly used in an office environment

*In order to help the learner achieve **Learning Outcome 2** in particular, consider doing the following:*

- consider with the learner the names and uses of software packages commonly used in an office environment, for example,

  o Microsoft Word for typing letters, reports or memos

  o Microsoft Publisher for producing flyers, newsletters, promotional material

  o Internet Explorer or Mozilla Firefox to access and display web pages and files on the internet

  o Sage or TAS for keeping accounts and for payroll

  o Microsoft Access or MySQL for databases

  o Norton Antivirus or McAfee for preventing, detecting and removing viruses, worms and spyware

  o Microsoft Outlook for managing e-mail accounts.

Managing information and documentation

Learning Outcome 2: Describe equipment and software packages commonly used in an office environment.

Learning Outcome 3: Outline the primary means of receiving, sourcing, recording, managing and circulating business related information and documentation.

*In order to help the learner achieve elements of **Learning Outcome 2** and **Learning Outcome 3** in particular, consider doing the following:*

- considering the activities that are common to an office environment, explore with the learner the equipment used by those working in that environment, for example,

  o computers for word processing, searching the internet, communicating with others via e-mail, desktop publishing, maintaining spreadsheets or databases, calculating employees pay and keeping accounts

  o printers for printing files for recording and filing purposes or for sending to another person or for photocopying and distributing

  o photocopiers for making copies of a document in colour or black and white, to enlarge or reduce the size of the items on the page, to collate, staple, copy two pages onto one

- o scanners for taking a digital image of whatever is scanned, for example, an image or text, so that the image can be saved to a computer or storage device or forwarded to others, thereby cutting down the amount of paper in circulation

- o franking machines for automatically stamping letters or packages for postage and computing the total charge

- o telephones for communicating with others in the office without having to leave one's desk, for communicating with people outside the office, for dealing with queries in a consistent manner if all telephone calls go through a central administrator who feeds the calls to a relevant person in the office

- o shredders for shredding any sensitive information once it has been dealt with

- o fax machines – for sending copies of documents over a telephone line which is faster than sending the documents by post

- • explore with the learner the different ways in which information and documentation can be moved within an office setting, to include:

  - o receiving information and documentation

    - ▪ telephone

    - ▪ fax

    - ▪ e-mail

    - ▪ voice mail

    - ▪ post

  - o sourcing information and documentation

    - ▪ the internet

    - ▪ brochures

    - ▪ quotations

    - ▪ invoices

    - ▪ price lists

    - ▪ timetables

    - ▪ calendars

  - o recording information and documentation

    - ▪ paper

    - ▪ local computer

    - ▪ answering machine

    - ▪ discs and memory sticks

    - ▪ computer server

  - o managing information and documentation

    - ▪ post book to record incoming and outgoing mail

    - ▪ telephone book to record incoming phone calls

    - ▪ filing

    - ▪ backing up files from the computer

  - o circulating information and documentation

- memos
- circulars
- post
- e-mail
- telephone
- fax
- voice mail
- telephone messages
- newsletters
- websites .

Contracts

Learning Outcome 4: Describe contracts of employment, including permanent, temporary and fixed term contracts.

*In order to help the learner achieve **Learning Outcome 4**, in particular, consider doing the following:*

- review with the learner the different types of work contracts, and the features of these contracts, that may be used by organisations when employing people, to include:
    - permanent contracts
    - temporary contracts
    - fixed term contracts.

Unit 2: Working in an Office Environment

Confidentiality in the office

Learning Outcome 5: Demonstrate an understanding of the importance of confidentiality in an office.

*In order to help the learner achieve **Learning Outcome 5**, in particular, consider doing the following:*

- explore with the learner the issue of confidentiality when working in an office environment, for example,
    - review the types of information that would need to be kept confidential, for example, information relating to:
        - employees' personal information
        - salaries and conditions of employment of employees
        - creditors and debtors and their financial dealings with an organisation
        - financial issues relating to the organisation
    - consider the ways in which information can be kept confidential, for example, by:
        - ensuring only those with authorisation may have access to information
        - briefing and training employees in how to deal with information in a confidential manner
        - encrypting data that is confidentially sensitive
        - recording, managing and circulating information in a manner appropriate to the

content of the information and documentation in question.

Applying communications, team work and quality in an office

Learning Outcome 10: Demonstrate the application of communications, team working and quality awareness in an office environment.

*In order to help the learner achieve **Learning Outcome 10**, in particular, consider doing the following:*

- facilitate the learner to work in an office environment in an appropriate manner, to include the following:
  - o demonstrating an understanding of the importance of confidentiality in an office, for example, by:
    - ▪ only accessing information that it is appropriate to access and for which permission has been granted
    - ▪ passing on telephone messages to the relevant person in an appropriate manner
    - ▪ filing away data in a safe and secure manner
    - ▪ shredding any sensitive information once it has been dealt with
    - ▪ not talking about office matters outside of the office or outside of work time
  - o working effectively as part of the team who work in the office, for example:
    - ▪ identifying an area of personal responsibility within the office
    - ▪ working to agreed deadlines within the team
    - ▪ working to the procedures or methods outlined for specific tasks
    - ▪ asking questions on any area of uncertainty regarding instructions given
  - o communicating appropriately with work colleagues, visitors to the office or those on the telephone or e-mail, for example:
    - ▪ using appropriate language at all times and avoiding swearing or cursing
    - ▪ using non-verbal communication when speaking or listening to another person
    - ▪ listening to others to hear what they are saying and responding appropriately
    - ▪ keeping e-mails or letters business like and formal
    - ▪ not talking about people or gossiping about others in the work place
  - o working in a quality manner, for example:
    - ▪ being aware of what is expected of employees of the organisation and striving to work to the same high standard
    - ▪ demonstrating an awareness of the quality of service being provided by the others in the office environment and supporting them in providing this service.

Health, safety and hygiene in the office

Learning Outcome 11: Apply appropriate health, safety and personal hygiene procedures when working in an office environment.

*In order to help the learner achieve **Learning Outcome 11**, in particular, consider doing the following:*

- facilitate the learner to work in an office environment in an appropriate manner by:
  - o being aware of appropriate health and safety procedures, for example:
    - ▪ using equipment as instructed and as demonstrated

- playing your part in ensuring passage ways are free from obstruction

- taking due care when carrying items in the office

- keeping cables from machinery or equipment tidy and out of the way

- knowing the fire drill and the identity of the person trained in first aid

- reporting any broken or damaged equipment

  o applying appropriate personal hygiene procedures, for example:

  - wearing clean clothes, socks and footwear

  - ensuring hair, nails, teeth and skin are clean and appropriately presented

  - washing hands regularly to reduce the risk of spreading germs and infections.

Reception duties

Learning Outcome 7: Carry out a broad range of general reception duties including making and receiving telephone calls, receiving visitors.

*In order to help the learner achieve **Learning Outcome 7**, in particular, consider doing the following:*

- facilitate the learner to work in an office environment and to carry out the following general reception duties:

  o answering the phone, to include:

  - an appropriate opening, for example, hello, good morning, good afternoon

  - an appropriate introduction to the organisation the caller is through to, for example, Ryan and son auctioneers

  - the name of the person answering the phone, for example, Mary speaking

  - listening to the caller to see what s/he wants

  - dealing with the purpose of the call by doing one of the following:

    ❖ answering the query posed by the caller
    ❖ putting the caller through to the person s/he wishes to speak to
    ❖ taking a message for the person the caller wishes to speak to but cannot   at this time, noting the caller's name, contact number, date and time of   call

  - thanking the caller

  - hanging up appropriately

  o making a telephone call, to include:

  - phoning at an appropriate time, for example, after 9.00 a.m. in the morning and before 5.00 p.m. in the evening

  - introducing yourself in an appropriate manner, for example, hello, this is Mary Ryan from Hogan motors

  - being clear and concise about the reason you are making the phone call, for example, may I speak to __ / can you tell me please ___/ can you send me a ___ please?

  - thanking the person on the other end of the line

  - hanging up appropriately

  o receiving visitors to the reception desk, to include:

  - greeting the person appropriately, for example, hello, good morning, how may i

help you, good afternoon

- listening to the person's query

- dealing with the query in an appropriate manner

- using appropriate non-verbal communication, for example, nodding, smiling, using eye contact

- speaking clearly to the person in appropriate language

- terminating the conversation in an appropriate manner, for example, thank you, good bye, have a nice day, safe journey.

Conveying messages

Learning Outcome 9: Communicate efficiently, noting messages concisely and conveying accurately to relevant person.

*In order to help the learner achieve **Learning Outcome 9**, in particular, consider doing the following:*

- facilitate the learner to communicate efficiently by:
  - taking messages for someone else, to include:
    - greeting the person appropriately
    - noting the message in clear, accurate and concise detail
    - conveying the message to the relevant person.

Preparing physical documentation

Learning Outcome 6: Prepare a variety of physical documentation for circulation including photocopying back to back, reducing and increasing size, collating, binding and stapling.

*In order to help the learner achieve **Learning Outcome 6**, in particular, consider doing the following:*

- facilitate the learner to prepare a variety of documents for circulation in an office environment, to include:
  - using the photocopier, to include:
    - photocopying documents back to back
    - reducing the size of the document being photocopied
    - enlarging the size of the document being photocopied
  - collating the pages together and stapling them into the one document, as appropriate to the size of the overall document
  - collating the pages together and binding them into the one document, as appropriate to the size of the overall document.

Maintaining petty cash

Learning Outcome 8: Maintain a petty cash float.

*In order to help the learner achieve **Learning Outcome 8** in particular, consider doing the following:*

- facilitate the learner to operate a petty cash system, to include:
  - documenting every petty cash transaction, including, the date of the transaction, the amount in

question and a general description of the transaction

- o keeping receipts for each transaction recorded

- o keeping a record of how much money is in petty cash at any time and balancing it

- o requesting that petty cash be replenished once it is running low.

11.a   Specific Information Relating to the Assessment Techniques

The assessor (teacher/tutor) is required to devise Assessment Brief/s for the Collection of Work. In devising the Assessment Brief/s, care should be taken to ensure that the learner is given the opportunity to show evidence of ALL learning outcomes. Each learner is required to work alone in completing the Collection of Work. There is no facility for this Collection of work to be completed as a group.

Evidence that the learner has achieved the learning outcomes may take a variety of forms including tutor verification of the learner's contribution, learner's worksheet, diagrams, cloze tests, multiple choice statements, visual presentation or another appropriate evidence in the form of written, oral, graphic, audio, visual or any combination of these. Any audio or visual evidence must be provided in a suitable format. All of the evidence must be retained n the learner's assessment portfolio.

Collection of Work	50%

The Collection of Work may be produced throughout the duration of this programme module. It must be clearly indicated where evidence covers more than one learning outcome.

The learner will compile a collection of work to include evidence that demonstrates the following:

- an outline of a minimum of 5 of the most commonly found departments in 2 large organisations

- an understanding of a minimum of 5 of the most common pieces of equipment used in an office environment and the role that equipment plays in office work

- an understanding of a minimum of 5 of the most common software applications used in an office environment and the role these applications play in office work

- an outline of the different means of dealing with business related information and documentation in an office to include:
    - receiving information and documentation
    - sourcing information and documentation
    - recording information and documentation
    - managing information and documentation
    - circulating information and documentation
- an understanding of the different types of contracts of employment, to include:
    - permanent
    - temporary
    - fixed term
- the ability to maintain a petty cash float, to include:
    - maintaining all relevant receipts
    - recording all petty cash transactions
    - keeping a balance of the money in petty cash at any time.

Skills Demonstration	50%

The learner will complete a number of Skills Demonstrations at appropriate intervals during the programme. Evidence of the Skills Demonstrations must be included in the assessment portfolio. The evidence may be photographs, video, audio or digital evidence, or other appropriate evidence of the learner completing the tasks.

The learner must complete a number of Skills Demonstrations as follows:

- carry out a range of general reception duties, to include:
    - o make a minimum of 4 phone calls to request information of some description
    - o answer a minimum of 4 phone calls and deal appropriately with the queries posed by the caller
    - o receive a minimum of 4 visitors to reception and deal with their queries appropriately
    - o communicate appropriately with people in contact with reception
    - o note messages clearly and concisely and report these messages to the relevant person

- prepare a range of documentation for distribution, to include:
    - o use a photocopier to:
        - photocopy back to back documentation
        - reduce the size of the data on the page being photocopied
        - enlarge the size of the data on the page being photocopied
    - o collate the documentation in the correct order
    - o bind the documentation in an appropriate manner
    - o staple the documentation in an appropriate manner

- apply appropriate procedures when working in an office environment, to include:
    - o health procedures
    - o safety procedures
    - o personal hygiene procedures

- demonstrate the following when working in an office environment:
    - o the ability to work as part of a team and communicate properly
    - o an awareness of quality provision
    - o an understanding of the importance of confidentiality.

11.b   Assessment - **General Information – Office Procedures 3N0888**

All instructions for the learner should be clearly outlined in an Assessment Brief.

Mapping Each Learning Outcome to an Assessment Technique	
Learning Outcome	**Assessment Technique**
1. Outline the formal structures or departments commonly found in a large organisation.	Collection of Work
2. Describe equipment and software packages commonly used in an office environment.	Collection of Work
3. Outline the primary means of receiving, sourcing, recording, managing and circulating business related information and documentation.	Collection of Work
4. Describe contracts of employment, including permanent, temporary and fixed term contracts.	Collection of Work
5. Demonstrate an understanding of the importance of confidentiality in an office.	Skills Demonstration
6. Prepare a variety of physical documentation for circulation including photocopying back to back, reducing and increasing size, collating, binding and stapling.	Skills Demonstration
7. Carry out a broad range of general reception duties including making and receiving telephone calls, receiving visitors.	Skills Demonstration
8. Maintain a petty cash float.	Collection of Work
9. Communicate efficiently, noting messages concisely and conveying accurately to relevant person.	Skills Demonstration
10. Demonstrate the application of communications, team working and quality awareness in an office environment.	Skills Demonstration
11. Apply appropriate health, safety and personal hygiene procedures when working in an office environment.	Skills Demonstration

Grading

At Level 3 a learner is graded as Successful or Referred

Successful means that ALL the learning outcomes from the Component Specification have been demonstrated to an appropriate standard in the learner's portfolio of assessment

Referred means that the portfolio of assessment needs further work by the learner before s/he can demonstrate the standard and achieve certification from QQI

Learner's Name: _____ Learner's PPSN: _____

The learner will be able to:	Evidence of the following is included in the assessment portfolio:	✔ If present in portfolio	Please indicate where evidence is to be found
1. outline the formal structures or departments commonly found in a large organisation	• outline 5 departments or structures found in a large organisation		
2. describe equipment and software packages commonly used in an office	• describe 5 pieces of equipment commonly used in an office environment • describe 5 software packages commonly used in an office environment		
3. outline the primary means of receiving, sourcing, recording, managing and circulating business related information and documentation	• outline the primary ways of receiving business related information and documentation • outline the primary ways of sourcing business related information and documentation • outline the primary ways of recording business related information and documentation • outline the primary ways of managing business related information and documentation • outline the primary ways of circulating business related information and documentation		
4. describe contracts of employment, including permanent, temporary and fixed term contracts	• describe permanent contracts of employment • describe temporary contracts of employment • describe fixed term contracts of employment		
5. demonstrate an understanding of the importance of confidentiality in an office	• demonstrate an understanding of the concept of confidentiality in an office environment • demonstrate an understanding of the importance of confidentiality in an office environment		
6. prepare a variety of physical documentation for circulation including photocopying back to back, reducing and increasing size, collating, binding and stapling	• photocopy back to back • reduce the size of data on a document, using the photocopier • enlarge the size of data on a document, using the photocopier • collate a document for circulation • bind a document for circulation		

	• staple a document for circulation		
7. carry out a broad range of general reception duties including making and receiving telephone calls, receiving visitors	• receive 4 phone calls appropriately • make 4 phone calls appropriately • receive 4 visitors to reception appropriately		
8. maintain a petty cash float	• document petty cash transactions appropriately • keep receipts for transactions • record the balance outstanding in petty cash		
9. communicate efficiently, noting messages concisely and conveying accurately to relevant person	• communicate with others in the office efficiently • note messages accurately and concisely • convey messages to the appropriate person		
10. demonstrate the application of communications, team working and quality awareness in an office environment	• work appropriately as part of a team in the office environment • communicate effectively with those you come in contact with through your work • demonstrate an awareness of providing a quality service in the office environment		
11. apply appropriate health, safety and personal hygiene procedures when working in an office environment.	• apply appropriate health procedures when working in the office environment • apply appropriate safety procedures when working in the office environment • apply personal hygiene procedures when working in the office environment.		

This is to state that the evidence presented in the attached portfolio is complete and is the work of the named learner.

Learner's Signature: _____ Date: _____

Assessor's Signature: _____ Date: _____

External Authenticator's Signature: _____ Date: _____