NATIONAL CERTIFICATES (VOCATIONAL)

SUBJECT GUIDELINES

OFFICE PRACTICE

NQF LEVEL 2

September 2007

INTRODUCTION

A. What is Office Practice?

Office Practice equips students with the skills, knowledge, values and attitude required to be successful as an administrative, secretarial or personal assistant. The subject lays the foundation for lifelong learning and creates the opportunity for further and higher education.

Office Practice is designed to give students relevant and marketable skills and applied competencies for employment and self-employment in the office administration sector. Administration competencies apply to all industries, both in the formal and informal commercial sectors and the non-commercial sector. Office Practice simultaneously builds the cognitive ability and provides the required fundamental learning necessary to access employment in the business and administration sector and related studies at further and higher education level with enhanced employment opportunities.

B. Why is Office Practice important in the Office Administration programme?

A sound knowledge of business practice will serve students as a usable foundation in an office environment. The subject prepares students for the world of work in general and for performing office functions in particular. The practical components of business practice will increase students' competence levels in such a way that they will be productive in positions for which office skills are required.

Students will acquire the skills to work in an administrative environment, including small, medium and micro enterprises, where the acquisition of competence will add value to the student's job performance or increase the student's chances of finding employment.

C. The link between the Office Practice Learning Outcomes and the Critical and Developmental Outcomes

In Office Practice, students develop the skill to plan before commencing any work. Students learn to understand and adapt to the social environment by meaningfully interpreting office practices which they will come across in their future lives. They develop the logical thought processes so that instead of relying on set rules, they are able to apply basic office principles to new and unfamiliar situations. Students also develop a systematic approach to problem solving.

D. Factors that contribute to achieving the Office Practice Learning Outcomes

Students interested in commerce or the business world will benefit by doing Office Practice. This subject transfers the skills necessary for the office or personal assistant function of any business and is essential for any student exploring management as a future career opportunity. Students will acquire the core skills of handling information, technology and communication and secretarial skills, practices and procedures in a business environment. Students will also develop the ability to communicate effectively in an office environment and the ability to be creative and people-centred in an office environment.

Students who have specific characteristics such as thoroughness, accuracy and orderliness will enjoy Office Practice.

OFFICE PRACTICE – LEVEL 2

CONTENTS

1 DURATION AND TUITION TIME

This is a one-year instructional programme comprising 200 teaching and learning hours. The subject may be offered on a part-time basis provided the student meets all the assessment requirements.

Students with special education needs (LSEN) must be catered for in a way that eliminates barriers to learning.

2 SUBJECT LEVEL FOCUS

The student will be able to plan and organise secretarial work in a business environment.

3 ASSESSMENT REQUIREMENTS

3.1 Internal assessment (50 percent)

3.1.1 Theoretical component

The theoretical component forms 40 percent of the internal assessment mark.

Internal assessment of the theoretical component in Office Practice Level 2 takes the form of observation, class questions, group work, informal group competitions with rewards, individual discussions with students, class, topic and semester tests and internal examinations. Lecturers can observe students when marking exercises from the previous day and asking class questions.

Assignments, case studies and tests can be completed at the end of a topic. Tests and internal examinations must form part of the internal assessment.

3.1.2 Practical component

The practical component forms 60 percent of the internal assessment mark.

Practical components include applications and exercises. All practical components must be indicated in a Portfolio of Evidence (PoE).

Internal assessment of the practical component in Office Practice Level 2 takes the form of assignments, practical exercises, case studies and practical examinations in a simulated business environment.

Students may complete practical exercises daily. Assignments and case studies can be completed at the end of a topic. Practical examinations can form part of internal practical assessment.

- **Some examples of practical assessments include, but are not limited to:**
    A. Presentations (lectures, demonstrations, group discussions and activities, practical work, observation, role-play, independent activity, synthesis and evaluation)
    B. Exhibitions by students
    C. Visits undertaken by students based on a structured assignment task
    D. Research
    E. Task performance in a "Structured Environment"

- **Definition of the term "Structured Environment"**

For the purposes of assessment, "Structured Environment" refers to a simulated workplace or workshop environment. A practicum room should be available at each campus for practical assessments.

- **Evidence in practical assessments**

All evidence pertaining to evaluation of practical work must be reflected in the students' Portfolio of Evidence (PoE). The tools and instruments constructed and used to conduct these assessments must be clear from the evidence contained in the Portfolio of Evidence (PoE).

3.1.3   Processing of internal assessment mark for the year

A year mark out of 100 is calculated by adding the marks of the theoretical component (40 percent) and the practical component (60 percent) of the internal continuous assessment (ICASS).

3.1.4   Moderation of internal assessment mark

Internal assessment is subjected to internal and external moderation procedures as set out in the *National Examinations Policy for FET College Programmes*.

3.2   External assessment (50 percent)

A National Examination is conducted annually in October or November by means of a paper(s) set and moderated externally. A practical component will also be assessed.

External assessment details and procedures are set out in the *Assessment Guidelines: Office Practice* (Level 2).

4   WEIGHTED VALUES OF TOPICS

TOPICS	WEIGHTED VALUE
1. Maintain the Reception Area	10
2. Answer Customer Enquiries in an Office Setting	10
3. Receive, Consult and Direct Visitors in a Reception Area	10
4. Employ Effective Telephone Etiquette	20
5. Operate and Take Care of Equipment	10
6. Receive, Distribute and Dispatch Mail	20
7. Create Evidence and Maintain Confidentiality	10
8. File a Variety of Documents in Existing Systems	10
TOTAL	**100**

5   CALCULATION OF FINAL MARK

Internal assessment mark: Student's mark/100 x 50 = a mark out of 50 (a)

Examination mark: Student's mark/100 x 50 = a mark out of 50 (b)

Final mark: (a) + (b) = a mark out of 100

All marks are systematically processed and accurately recorded to be available as hard copy evidence for, amongst others, reporting, moderation and verification purposes.

6   PASS REQUIREMENTS

The student must obtain at least fifty (50) percent in ICASS and fifty (50) percent in the examination.

7   SUBJECT AND LEARNING OUTCOMES

On the completion of Office Practice Level 2, the student should have covered the following topics:

Topic 1:   Maintain the Reception Area
Topic 2:   Answer Customer Enquiries in an Office Setting
Topic 3:   Receive, Consult and Direct Visitors in a Reception Area
Topic 4:   Employ Effective Telephone Etiquette
Topic 5:   Operate and Take Care of Equipment
Topic 6:   Receive, Distribute and Dispatch Mail
Topic 7:   Create Evidence and Maintain Confidentiality
Topic 8:   File a Variety of Documents in Existing Systems

7.1 Topic 1: Maintain the Reception Area

Subject Outcome 1: Describe and apply security procedures according to organisational requirements.

Learning Outcomes:

The student should be able to:
- Explain how visitor cards and permits are issued and displayed.
- Describe the procedure for handing in visitors' firearms.
- Describe and apply procedures for validating unidentified visitors roaming on the premises.

Subject Outcome 2: Maintain a clean and safe reception area according to organisational standards.

Learning Outcomes:

The student should be able to:
- List and explain housekeeping standards according to organisational requirements.
- Implement housekeeping standards within agreed timeframes.
- Demonstrate that reception services are not disrupted while housekeeping activities are performed.

Subject Outcome 3: Create a presentable reception area.

Learning Outcomes:

The student should be able to:
- Relate and co-ordinate corporate image displays to create a presentable reception area.
- Keep the display area neat, tidy and clean at all times.
- Constantly maintain and stock brochures of companies for distribution.

7.2 Topic 2: Answer Customer Enquiries in an Office Setting

Subject Outcome 1: Greet a customer and identify his or her needs or problems.

Learning Outcomes:

The student should be able to:
- Greet the customer courteously according to established procedures.
- Request or obtain additional information to clarify the customer's need.
- Identify the customer's need and, if necessary, reflect back to the customer to obtain clarity.
- Describe and apply known procedures to resolve enquiries of semi-routine and predictable nature.

Subject Outcome 2: Attend to a customer's telephone, facsimile and electronic request.

Learning Outcomes:

The student should be able to:
- Answer queries in a limited range of established contexts clearly, accurately, objectively and confidently.
- Supply requested information or refuse requests politely and provide reasons for declining requests.
- Request and record details of customers by following established and familiar procedures (limited to computerised spreadsheets and/or logbooks).
- Note the details of the enquiry and reflect back to the caller to check for accuracy.
- Conclude the call according to established and familiar procedures.

Subject Outcome 3: Refer a customer's request.

Learning Outcomes:

The student should be able to:
- Follow established procedures to explain delays or non-availability of assistance.
- Identify and describe enquiries of unpredictable nature that should be referred to experienced staff.
- Describe and apply procedures for dealing with unusual or unfamiliar problems and queries.
- Explain how to reach agreement with the customer on follow-up actions.

Subject Outcome 4: Respond to customers in a face-to-face situation and on the telephone.

Learning Outcomes:

The student should be able to:

- Identify and acknowledge customer complaints according to established procedures.
- Describe and apply procedures to obtain accurate and relevant information needed to deal with queries.
- Communicate complaints and promises made to customers promptly to senior staff for information and verification.
- After consultation with senior staff members, give feedback to customers regarding the progress of complaints.
- Describe and apply procedures to classify calls.
- Record the client interaction as required by company policy.

7.3   Topic 3: Receive, Consult and Direct Visitors in a Reception Area

Subject Outcome 1: Receive visitors in accordance with organisational requirements.
Learning Outcomes:
The student should be able to:
- Acknowledge and greet visitors according to organisational requirements.
- Establish a rapport with visitors.
- Maintain professional appearance and behaviour at all times.
- Verify visitors' requirements according to organisational requirements.

Subject Outcome 2: Process visitors' requirements according to organisational procedures.
Learning Outcomes:
The student should be able to:
- Consult visitors in a professional manner and establish the reason for their visit.
- Attend promptly to a request for information.
- Estimate the time or waiting period and convey it to the client.
- Document and dispatch documents or deliveries as per organisational requirements.

Subject Outcome 3: Direct visitors according to organisational requirements.
Learning Outcomes:
The student should be able to:
- Notify relevant parties of visitors' arrival.
- Give clear directions to visitors to relevant areas in the workplace.
- Explain and apply security procedures for visitors.

7.4   Topic 4: Employ Effective Telephone Etiquette

Subject Outcome 1: Employ effective telephone etiquette.
Learning Outcomes:
The student should be able to:
- Explain and apply telephone etiquette and answering procedures.
- Identify and explain factors that hinder communication.
- Handle calls with discretion and confidentiality.
- Put the caller on hold when not conversing directly with the caller.
- Frequently consult with a caller on hold and establish whether he or she wishes to remain on hold.

Subject Outcome 2: Answer telephone according to organisational standards.
Learning Outcomes:
The student should be able to:
- Answer telephones promptly and according to standard operating procedures.
- Greet caller according to organisational requirements.
- Acquire relevant caller information during initial interaction.

Subject Outcome 3: Process incoming calls according to organisational standards.
Learning Outcomes:
The student should be able to:

- Redirect calls appropriately.
- Explain and apply the correct techniques to handle and hold multiple lines.
- Screen calls as per standard operating procedures.
- Take and transmit messages if required or requested according to organisational requirements.
- If required, obtain further assistance from appropriate sources.

Subject Outcome 4: Process outgoing calls in accordance with organisational requirements.

Learning Outcomes:

The student should be able to:
- Obtain and prepare information and documentation required for the call.
- Dial the correct number when making outgoing calls.
- Clearly state the purpose of calls according to organisational procedures.
- Record resulting actions from calls.
- If required or requested, leave messages according to organisational requirements.

7.5   Topic 5: Operate and Take Care of Equipment

Subject Outcome 1: Operate four different items of office equipment according to manufacturer operating instructions.

Learning Outcomes:

The student should be able to:
- Explain and apply instructions for operating equipment responsibly and with due regard for safety.
- Apply known solutions to identify and solve predictable problems or faults that occur routinely.
- Identify and report persistent and non-routine problems or faults that require technical skills to the relevant authority.

Subject Outcome 2: Maintain equipment in a clean and working condition.

Learning Outcomes:

The student should be able to:
- Clean and maintain equipment and replace consumable items according to the manufacturer's instructions.
- Explain the dangers of working with electricity and apply the prescribed safety precautions when cleaning equipment.
- Dispose of discarded items safely and appropriately.
- Leave equipment and immediate work areas in a clean and tidy condition.
- Store and dispatch recyclable components safely and according to company policy.

Subject Outcome 3: Monitor and request equipment consumables.

Learning Outcomes:

The student should be able to:
- Calculate the average daily quantity of consumables needed per item of equipment.
- Describe and apply procedures to monitor equipment consumable levels and report low levels.
- Request equipment consumables according to established procedures.
- Describe and apply procedures for secure handling and storage of equipment consumables.
- Use equipment consumables in expiry date sequence, the oldest products first.
- Keep up-to-date, legible and accurate equipment consumable records.

Subject Outcome 4: Identify and minimise safety risks when operating equipment in an office environment.

Learning Outcomes:

The student should be able to:
- Correct existing or potential safety risks involving equipment in own area of responsibility.
- Identify and describe safety risks involving equipment outside own responsibility and report risks promptly and accurately to the appropriate authority.
- Identify and describe actions to deal with emergencies involving equipment.
- Report and record emergencies involving equipment accurately in an agreed format.
- Organise the area around equipment to minimise risk to self and others.

- Identify and apply procedures to minimise safety risks when operating equipment in an office environment.

7.6   Topic 6: Receive, Distribute and Dispatch Mail

Subject Outcome 1: Receive and sort mail.

Learning Outcomes:

The student should be able to:
- Receive mail according to established procedures.
- Sort mail according to established procedures within an appropriate time.
- Describe the importance of maintaining confidentiality and security of documentation in terms of receiving and sorting mail.
- Strictly observe confidentiality in terms of a mailroom code of conduct.

Subject Outcome 2: Distribute and dispatch mail.

Learning Outcomes:

The student should be able to:
- Distribute mail internally to relevant persons within an agreed time.
- Explain possible reasons for unavoidable or necessary delays in distribution and describe the possible consequences of delays.
- Describe and apply procedures for dispatching mail externally in accordance with established procedures and Post Office requirements.
- Attach enclosures securely and report missing items according to organisational procedures.
- Address mail legibly and correctly for internal and external distribution.
- Dispatch mail externally by Post Office or courier service within agreed deadlines.

Subject Outcome 3: Describe the importance of mailroom processes and why it is necessary to create evidence.

Learning Outcomes:

The student should be able to:
- Explain the reasons for stamping incoming mail. Stamp mail correctly according to established requirements.
- Record procedures for executing different tasks and explain the reason for creating the record in terms of departmental requirements.
- Explain the legal implications of neglecting to comply with mailroom procedures in terms of own work performance and possible cost to the company.
- Explain why it is important to avoid unnecessary errors in terms of cost and own performance.

7.7   Topic 7: Create Evidence and Maintain Confidentiality

Subject Outcome 1: Identify and maintain the types of record required in own industry and understand why it is necessary to create evidence and maintain confidentiality.

Learning Outcomes:

The student should be able to:
- Explain the reason for recording information with reference to an actual document used in a selected business sector.
- List five examples of the types of information contained in records in one's own business sector.
- Name three methods of creating records that use different types of technology.
- Describe three different roles in an organisation and explain the purposes for which records are kept.

Subject Outcome 2: Name and describe the types of record that are specific to a contract in a selected business sector.

Learning Outcomes:

The student should be able to:
- Explain the type of information contained in a contract, agreement or quotation with reference to an actual document.

- Describe the purpose of maintaining a record of contracts, agreements and quotations with reference to specific case studies.
- Explain the importance of recording specific client details with examples from a selected business sector.
- Explain the purpose of recording changes to contracts, agreements and quotations with reference to three different circumstances.

Subject Outcome 3: Locate and provide records to users on request.

Learning Outcomes:

The student should be able to:
- Use suitable paper or electronic filing systems to locate the required record.
- Locate, access and retrieve requested data within agreed organisational service levels.
- Explain reasons why confidential records are given only to authorised people and the implications of releasing information to unauthorised persons in terms of risk to the organisation.
- Make and provide a copy of a record, note compliance to original documents and return original documents to their correct location.
- Explain and apply security and confidentiality procedures for records.

Subject Outcome 4: Maintain confidentiality of customer and company information.

Learning Outcomes:

The student should be able to:
- Use established procedures to identify and report violations of company procedures relating to confidentiality of information.
- Identify and disclose classified information to approved personnel.
- Explain organisational and legal requirements for storage systems and procedures.
- Identify situations where colleagues do not comply with security and confidentiality procedures and report immediately to the appropriate authority.
- Carry out all work activities according to the code of conduct and within the security requirements of the organisation.

7.8   Topic 8: File a Variety of Documents in Existing Systems

Subject Outcome 1: File a variety of documents in existing systems.

Learning Outcomes:

The student should be able to:
- Oversee that paper-based documentation is classified, sorted and recorded according to established procedures.
- Store information in the correct location and sequence and explain the effect of misfiled documentation on an organisation.
- Store documents in a manner that ensures safety, security and accessibility.
- Classify information and cross-reference accurately.
- Refer classification uncertainties to an appropriate authority.
- Explain methods of classification and cross-referencing and problems resulting from unconventional classification and cross-referencing.
- Archive and locate documents according to organisational procedures.
- Explain the implications for productivity when an item cannot be located.
- Source and gather filing documentation.
- Electronically create and label documents according to organisational requirements.
- File electronic documentation according to organisational requirements.
- Complete filing within organisational timeframes and standards.
- Sort, classify and store all materials in a safe and secure manner.

Subject Outcome 2: Retrieve information from an existing storage system.

Learning Outcomes:

The student should be able to:
- Obtain, copy and dispatch information promptly to the correct person or location.
- Communicate supply delays and politely explain reasons for delay.

- Record information retrieved correctly to track all files.
- Identify missing or overdue items and follow correct procedures to locate them.

Subject Outcome 3: Store valuable documentation and reference materials securely.

Learning Outcomes:

The student should be able to:
- Explain and maintain the process for securing valuable items.
- Explain the reasons for security procedures and describe the effects of a breach of security on an organisation.
- Identify and correct security risks in own area of responsibility.
- Identify and report security violations according to organisational procedures.

8   RESOURCE NEEDS FOR THE TEACHING OF OFFICE PRACTICE – LEVEL 2

8.1   Physical resources

The following teaching aids should be made available, if possible:

8.1.1   Practicum room

- A simulated enterprise in which students can gain practical experience within an office environment
- Necessary electronic equipment for an office, for example adding machine, cash registers calculators and filing cabinets
- Computer and data projector to electronically project data

8.1.2   Media centre

- Computers and printers for students to complete assignments or case studies and do research
- Access to the Internet
- Trading magazines, daily newspapers and subject-related reference books
- Subject-related DVDs or videos
- List of guest speakers
- List of website addresses for subject-related research
- Legislation or acts for use by lecturers during lessons and students for research purposes
- Research software, for example Encarta
- Stockroom to store video or DVD machines, televisions, etc.
- Security for stockroom

8.1.3   Class room

- Flash disk for facilitator to store information
- White board or black board
- Desks for students big enough to work on alone as well as in groups
- Chairs

8.2   Human resources

The lecturer should have an applicable three-year diploma or four-year degree in education. The lecturer must also have been declared competent as an assessor and/or moderator and be trained in outcomes-based education.

8.3   Other resources

- Text books
- Lever arch file for each student to serve as Portfolio of Evidence (PoE)
- Subscription fees for Internet, industry magazines and newspapers