

Level 1 and 2 Office Procedures (8965)

Examination support guide

100/5757/0 Level 1

100/5788/2 Level 2



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About this document

This document contains the information that centres need to offer the following Single Subject:

Level 1 & 2 Certificate in Office Procedures

City & Guilds qualification number	8965	
QCA accreditation number	100/5787/0	Level 1
	100/5788/2	Level 2

This document includes details and guidance on:

- aim of the qualification
- syllabus objectives
- general advice for centres
- assessment requirements
- sample papers and marking guides.

About the qualification

Introduction

Aim of qualification

To demonstrate candidates ability and knowledge of carrying out general office work, communications, office systems and use of office equipment.

Level 1

This level is aimed at candidates' who are either training to work in offices and are seeking their first qualification or candidates who are already employed in an office and wish to enhance their prospects by gaining a first qualification in office work.

Level 1 tests candidates' knowledge of the content of office work, the importance of effective communications in modern business, the procedures associated with typical basic office systems, the fundamentals of operating a simple filing system and the use of the main types of machinery and equipment found in an office.

Level 2

This level is aimed at candidates who are progressing from Level 1 and candidates who already have office experience and are aiming to achieve a qualification that reflects their knowledge and ability.

Level 2 tests the candidate's knowledge of the structure and function of departments, the importance of interpersonal, oral and writing skills and the contribution of technology to modern business, the processes involved in business transactions and the preparation and organisation of meetings and travel.

Both Level 1 and Level 2 are free-standing single subjects with their own certification.

Target group

Those who propose to work, have worked or are working in first level clerical roles. It is suitable for those already following full time courses or those who require a foundation of knowledge upon which to develop further administrative, financial and or secretarial skills.

About the qualification

General advice for centres

Guided learning hours

City & Guilds do not determine the length of courses, or the number of hours of study required (ie in the classroom or in self-study set by the trainer/tutor).

The best indicator is when candidates have covered all areas of the syllabus and can successfully complete a sample test paper within the given time.

Success in the examination results from demonstrating the ability to achieve the objectives that will be tested. Practice papers will enable candidates to know what is expected of them in an examination.

The recommended learning hours for each level is 90 hours. Please note that the length of each course will vary according to the circumstances and learners.

Office Procedures – Level 1

Syllabus objectives

The candidate should be able to:

1 The office

1.1 Services

Describe general office work in relation to:

- Receiving incoming and sending outgoing communication in the form of electronic mail, letters, forms, telephone, fax and courier.
- Sorting and processing information, manually and with the help of machines.
- Communicating information ie verbally, in writing and by technological means.
- Recording and storing information for future reference.

1.2 Staff

- Identify the roles of clerical, secretarial, reception and administrative support staff.
- Describe their basic duties and responsibilities.

1.3 Health and safety

- Identify potential hazards in an office and explain how they can be avoided.
- Describe and undertake standard procedures for reporting hazards and accidents.
- Identify safety procedures for dealing with accidents, fires and other emergencies.
- Identify safe working practices to maintain a safe and healthy working environment.

2 Communications

2.1 Oral and written

- Describe the essential skills of good telephone techniques, including the use of answering machines.
- Design and complete telephone message forms.
- Describe the communication skills required by reception staff.
- Compose simple letters, memos and electronic mail.
- Identify ways of safeguarding information and maintaining confidentiality.

3 Systems and procedures

3.1 Handling the mail

- Describe a system for opening, distributing and circulating incoming mail within an organisation.
- Describe procedures for preparing and despatching outgoing mail.

3.2 Stationery and stock

- Describe simple stock control procedures for the ordering, storing and issuing of office stationery and supplies.
- Complete stock requisitions and stock control cards.

3.3 Purchase and sale of goods

- Identify the principal documents used in the purchase and sale of goods.
- Describe the flow of these documents in a business transaction.
- Complete orders and invoices from information provided, which may include simple calculations and percentages.
- Differentiate between trade and cash discounts.

3.4 Petty cash

- Describe the operation of a petty cash system.
- Complete a petty cash account from information supplied, including petty cash vouchers.

4 Filing

4.1 Methods of classification

- Identify and use the principal classification systems: alphabetical, numerical, subject, geographical and chronological.
- State the advantages and disadvantages of the different systems.

4.2 Rules

- List the basic rules for operating a filing system.
- Place a selection of given items in the requested filing classification.
- Design and complete suitable cross reference cards.
- State the need to operate absence/out-guide and cross-referencing systems.

4.3 Equipment and storage

- Distinguish between vertical and lateral filing methods.
- Describe methods of filing and record-keeping using computers (electronic filing).

5 Office support and equipment

5.1 Computers

- Describe the care and routine maintenance of computers and peripheral equipment.
- Identify removable storage media.
- Identify different computer hardware.
- Identify different software packages and their uses.

5.2 Photocopying

- Describe the different functions and features that photocopiers may have.
- Outline methods of producing good copies, avoiding waste and achieving economy.
- Recognise the range of support equipment, ie collators, joggers, binders.

5.3 Mailroom

- Identify and briefly describe equipment used in mailing, ie for letter-opening, date and time stamping, addressing, labelling, sealing, weighing, franking, folding and inserting.

Office Procedures – Level 1

The examination

General points

The examination lasts for 1 hour 30 minutes. (Plus 5 minutes reading time). Note making during reading time is not allowed.

Examination

The examination paper will be a question and answer booklet comprising of two parts: Section A and Section B.

Section A – 15 short answer questions covering all sections of the syllabus.

Section B – Scenario based integrated tasks covering a minimum of two sections of the syllabus.

All questions and tasks are compulsory.

Candidates must complete all tasks within the examination time.

Calculators and English and mother tongue dictionaries are allowed during the examination.

All final answers must be in blue or black ink.

If additional separate sheets of paper are used, make sure they are clearly labelled with the candidate's name.

Assessment

Candidates' performance will be assessed as follows:

Section A – 45 marks will be awarded for correct answers to the short answer questions.

Section B – 25 marks will be awarded for the scenario based integrated tasks.

Marks for Sections A and B are aggregated at least 40% must be achieved in each section.

Section A: a minimum of 18 marks.

Section B: a minimum of 10 marks.

To be awarded a **Pass** candidates must achieve 54%. (38 out of 70 marks)

A **First Class Pass** will be awarded to candidates who achieve 70% overall (49 out of 70 marks).

Standards

All examination papers are written to stringent test specifications. This means that each examination tests the same elements. All papers are then moderated to ensure that the standard is correct and there are not any problems with the topic or level of the language used.

Marking schemes

All examination papers have individual marking schemes which allow for a range of acceptable answers. Candidates who make valid points that differ from those on the marking scheme are awarded marks for them whereas candidates who write about the topic but do not answer the question receive no marks.

Although individual mark schemes allocate marks for content and style according to the requirements of the question, marks for the layout of standard documents are allocated as follows:

Memos –	Correct format and layout To, From and Date are essential Memo, Ref, Heading optional	2 maximum
Letters –	Correct format and layout Date, Addressee, Salutation Complimentary close are essential	2 maximum

Additional marks may be awarded for other layout requirements specific to a question.

Weakness codes

The weakness report is helpful in deciding how much further practice is required by unsuccessful candidates before retaking the examination, and which skills require particular attention.

Weaknesses are detailed on the results slip of unsuccessful candidates and on the results summary that is sent to the centres listing candidates results.

The examiner completes a weakness code as shown in the example below. Ticking those areas where a candidate has shown a particular weakness.

A Failed narrowly

Indicates that despite re-checking of borderline scripts, one or two too many errors have resulted in a fail. This code is used in conjunction with another Weakness Code.

B Question(s) not understood or misinterpreted

Used when it is obvious that candidates have misunderstood or misinterpreted a question due, in the main, to not reading it properly or reading it too quickly and not thinking before answering. Examples include giving employers' responsibilities instead of those of employees; stock control instead of stock requisition card; the requirements of a good filing system instead of the rules for carrying out filing.

C Knowledge of facts – restricted

This is evidenced in answers to questions requiring candidates to make a number of points and the same points are re-worded and repeated. Lack of knowledge is often apparent in questions requiring differentiation between vertical and lateral filing methods and trade and cash discounts.

D Comprehension/application – limited

Indicates imprecise or vague answers that display candidates either do not understand the questions or have insufficient knowledge and ability to answer them fully. Examples include inability to put business documents into the correct sequence when answering questions about the flow of documents and answers that omit essential information on the assumption that the marker will know what the candidate is writing about.

E Inability to apply knowledge appropriately

This code may be used to indicate candidates whose knowledge of the subject is good but who have not displayed the ability to use it in practical tasks, eg the completion of business documents. For example, candidates who know the meaning of the term 'unit price' but do not enter the unit price in the correct column of an invoice.

F Presentation – poor

Indicates scripts where the handwriting is illegible or there are untidy corrections or poorly completed business forms.

G Insufficient work submitted

Indicates that there were either too many gaps in a candidate's answers to gain sufficient marks to pass or some questions were accurately and completely answered but the paper was unfinished so that enough marks to pass was not possible.

H Answers contain irrelevant information

Refers to answers that relate to the theory of the topic in general rather than to the part of it that specifically relates to the question.

Office Procedures – Level 1

Advice to tutors

Syllabus

- Ensure full syllabus coverage and provide plenty of practice using similar tasks and questions.
- Correct and return candidates work with advice on those areas where it is obvious that their understanding is weak and revision is necessary.
- Give candidates plenty of opportunities to practise practical tasks, especially those requiring calculation.
- Provide model answers, showing how questions should be answered to help candidates learn what is expected of them in the examination.
- The City and Guilds' learner portal, www.smartscreen.co.uk, contains information about career planning, writing CVs and job applications that candidates should find helpful.
- Try to organise visits to offices and work experience for candidates.

Examination

- Advise candidates to make the most of the reading time.
- Emphasise to candidates the importance of reading whole questions, highlighting key words and planning answers before starting their written answers in the examination.
- Impress upon candidates that before the end of the examination they should carefully check through their scripts and neatly cross through workings, notes and other material they do not want marked.

Tips

- Read through this Guide with your candidates.
- Allow plenty of time for revision.
- Provide model answers to examination questions.
- Do not be tempted to skip any parts of the syllabus that learners do not enjoy!
- Give candidates lots of practical activities/assignments throughout the course.

Office Procedures – Level 1

Advice to candidates

City and Guilds want candidates' to achieve better results and the aim of this Guide is to provide the base for good practice and a clearer understanding of exactly what should be included in examination answers. It is hoped the following advice will help your candidates to succeed.

Syllabus

- You should have a knowledge and understanding of the whole syllabus.
- Keep a checklist of your course work, only ticking syllabus sections when you fully understand them.
- Make a list of the areas of the syllabus that cause you difficulty so that you can give them priority when you revise.
- To ensure you are up-to-date, do not rely solely on one textbook but use the Internet, your library and read newspapers and magazines.
- Where possible, undertake work experience in an office.

Practice

- Prepare thoroughly for the examination by learning and revising the full syllabus.
- Before the examination, make sure you have plenty of practice at completing forms such as orders, invoices and petty cash accounts.
- If you have your own bank account, use your experience of it to help you in the examination. Always reconcile your personal bank statements and study the information and forms relating to your account.
- Ensure you can compose simple letters, memos and e-mails using given information.
- Repeat all the sections of the syllabus that you personally have found difficult.

During the examination

- Use the reading time to thoroughly study the questions and make sure you know exactly what you have to do.
- Read instructions carefully and look at the marks for each question. This will help you decide approximately how long you need to spend on answering them.
- Make a rough plan of questions requiring the composition of business documents to ensure that all points are included.
- Check your answers to all questions, ensuring you have answered all parts of them.
- Ensure your handwriting is legible and mistakes are neatly corrected.
- All final answers should be written in blue or black ink.
- Cross through any work that you do not want to be marked.
- Make sure that you leave adequate time to check your work at the end of the examination.

Tips

- Think before you answer.
- Pay attention to handwriting, if a marker cannot read yours you will get no marks.
- Know the difference between **vertical** and **lateral** filing.
- Know the difference between **trade** and **cash** discounts.
- Practise working out percentages to help you easily answer questions that require the calculation of discounts.
- Remember – debit is 'in' and credit is 'out'.
- Make sure you know the difference between 'incoming' and 'outgoing' mail.
- Know the difference between **employer** and **employee**.
- Always ask your Tutor about anything you do not understand.
- Check you have answered all questions.

Office Procedures – Level 1

Sample examination paper

Office Procedures

Level 1

8965-11-001

(PR-OP 11)

SAMPLE 00003

This paper must be returned with the candidate's work, otherwise the entry will be void and no result will be issued.



Candidate's name (Block letters please)

Centre no

Date

Time allowed: 1 hour 30 minutes
(plus 5 minutes' reading time).

Section A Answer **all** 15 questions in Section A. Your answers should be written in the question booklet in the spaces provided.

Section B Answer **all** questions in Section B.

All final answers must be in blue or black ink.

If additional separate sheets of paper are used, make sure each page is clearly labelled with your name.

Calculators and English and mother tongue dictionaries can be used.

For examiner's use only

Section A	Section B	Total
45	25	70

Section A

Answer **all** questions in this section – 45 marks.

- 1 State **three** factors that should be taken into account when deciding which postal service to use for letters.

(3 marks)

- 2 List **three** types of unexpected visitors without appointments with whom a receptionist may have to deal with.

(3 marks)

- 3 Briefly explain **three** ways in which employees can help to prevent fires from starting.

(3 marks)

- 4 State **three** important pieces of information that should be given when leaving a message on a telephone answering machine.

(3 marks)

- 5 List **three** written forms of business communication, other than letters or memos.

(3 marks)

6 Give **three** rules that should be followed when dealing with incoming mail.

(3 marks)

7 Identify **three** reasons why a company sets a maximum level for stock purchase.

(3 marks)

8 Give **three** reasons why a company would offer a trade discount.

(3 marks)

9 Identify which **two** people should sign a completed petty cash voucher.

(2 marks)

10 State a different filing classification which would be **most** suitable for each of the following:

a Correspondence with agents or representatives in different locations.

b Correspondence with customers in a small or medium-sized company.

c Correspondence with account holders in a large bank.

d General correspondence which is not concerned with specific individuals but relates to a particular topic.

(4 marks)

11 Re-arrange the following **three** names for alphabetic filing:

P Adams & Sons
The Training Centre
Business Computers Ltd

(3 marks)

12 Give **three** disadvantages of electronic filing.

(3 marks)

13 Identify **three** precautions that should be taken when handling computer disks.

(3 marks)

14 List **three** ways to avoid waste when making photocopies.

(3 marks)

15 Name **three** pieces of equipment that could be used in processing outgoing mail.

(3 marks)

(Total 45 marks)

Section B

Answer **all** questions in this section – 25 marks

Scenario

You are employed by Lightzone & Foulger, Educational Publishers, as a trainee administrator. You are responsible to the Office Administrator, Natasha Li and you are required to complete the following tasks today:

- A health and safety report form
- A fax message sheet
- An invoice.

1 As you arrived at the office at 0900 hours today you saw Kirsty Marshall, a 19 year old filing clerk, slip and fall in the reception area whilst taking some files to the sales department. Due to heavy rain outside, the floor in the reception area was wet. The receptionist called for John Underwood who is responsible for first-aid. He examined Kirsty’s ankle which was swollen and twisted and decided to call an ambulance to take her to St Giles’ Hospital for an X-ray. As the receptionist was on the telephone at the time of the accident, you were the only witness. Make a record of the accident by completing the report form below.

(8 marks)

<p>LIGHTZONE & FOULGER</p> <p>ACCIDENT REPORT FORM</p> <p>Name of person who was injured _____</p> <p>Age _____ Job title _____</p> <p>Date of accident _____ Time of accident _____</p> <p>Place where accident occurred _____</p> <p>Activity being undertaken at the time the accident occurred _____</p> <p>Describe how the injury occurred _____</p> <p>Details of injury _____</p> <p>Did first-aider attend?: Yes/No* Was the injured person taken to hospital: Yes/No*</p> <p>Please state name of hospital _____</p> <p>Names of any witnesses to the accident _____</p> <p>Signature of person reporting accident _____ Date _____</p> <p>* Please delete as appropriate</p>
--

One of our location maps is to be faxed to Paul Hussein of O'Hara Security, fax number 04761-921734, who is coming tomorrow at 1030 hours on a security assessment visit. Please complete the fax message sheet below which is to be sent with the map, and confirm details of his visit. I will sign it.

NL

(6 marks)

FAX MESSAGE SHEET

LIGHTZONE & FOULGER
Educational Publishers
Curran House
SHEPWAY
SH7 6LD

Tel: 05671 8931

Fax: 05671 8932

E-mail: accounts@lightzonef.com

TO: _____

FAX NO: _____

FOR THE ATTENTION OF: _____

FROM: _____

DATE: _____

SUBJECT: _____

NO OF PAGES (including this page) _____

MESSSAGE:

Signature of sender:

Office Procedures – Level 1

Marking guide

Marking Scheme – Sample 00003

Accept any other suitable answers

Calculations – apply own figure rule if error in original calculation – ie apply $\frac{1}{2}$ marks for follow-through.

Section A – 45 marks

- 1 Urgency – how quickly is item required
Whether a signature on delivery is required
Whether a receipt of posting is required
Whether the item is valuable

1 mark each to a maximum of 3 marks

- 2 People enquiring about job vacancies
People asking for details of goods or services
Customers who have a complaint
Sales representatives
Charity collectors
(Do not accept regular callers such as postman, window cleaners etc)

1 mark each to a maximum of 3 marks

- 3 Do not place papers or clothing near heaters or lights
Report any faulty equipment or wiring
Switch off faulty equipment until it is made safe
Switch off electrical equipment when not in use
If smoking is allowed, use ashtrays and properly extinguish cigarettes

1 mark each to a maximum of 3 marks

- 4 Who the message is for
Name
Telephone number
If/when you will call back
If you wish someone to call you

1 mark each to a maximum of 3 marks

- 5 Faxes
E-mails
Forms
Notes
Reports
Minutes of meetings
Notices/posters
Written procedures

1 mark each to a maximum of 3 marks

- 6 Do not open envelopes marked Personal, Private or Confidential
Deal with envelopes marked urgent immediately
Tap contents down before opening the envelope
Staple enclosures to main correspondence
Check that envelopes are empty
Sort mail
Date stamp all mail
Enter cheques and cash in a remittance book

1 mark each to a maximum of 3 marks

- 7 To avoid deterioration
To avoid tying up capital
Storage issues
Reduces pilfering/theft
To avoid keeping large supplies of out of date stock

1 mark each to a maximum of 3 marks

- 8 Enables the buyer to make a profit
Encourages bulk buying
Encourages regular customers
To clear end of line/old stock
To correct an error on a price list
1 mark each to a maximum of 3 marks
- 9 The person who spends the money as evidence of the transaction
The supervisor who authorises the expenditure
1 mark each to a maximum of 2 marks
- 10 a Geographical
b Alphabetical
c Numerical
d Subject
1 mark each to a maximum of 4 marks
- 11 P Adams & Sons
Business Computers Ltd
Training Centre, The
1 mark each to a maximum of 3 marks
- 12 Accurate input of material needed
Needs to be updated regularly
Setting up system expensive
Need for staff training
Power-cuts
1 mark each to a maximum of 3 marks
- 13 Keep in boxes
Insert carefully into disk drives
Do not leave disks on or near other electronic equipment
Use only disks that have been checked for viruses
Do not store near hot radiators/fire/heat
Remove from machine before switching off whilst not in use
1 mark each to a maximum of 3 marks
- 14 Check sufficient toner
Correct number of copies selected
Make a test copy first
Check paper size
Check paper is inserted correctly/eg back-to-back/letterhead
Screen is clean
Good quality original
1 mark each to a maximum of 3 marks
- 15 Franking machines
Weighing scales
Labelling/addressing machines
Folding/inserting
Wrapping/rolling machines
(do not accept collators, joggers, binders)
1 mark each to a maximum of 3 marks

Total 45 marks

Section B

1

LIGHTZONE & FOULGER

ACCIDENT REPORT FORM

Name of person who was injured Kirsty Marshall (1)

Age 19 years (1) Job title Filing Clerk (1)

Date of accident Date of exam (1) Time of accident 0900 hours or 9am (1)

Place where accident occurred Reception area (1)

Activity being undertaken at the time the accident occurred Taking files to Sales Department (1)

Describe how the injury occurred Slipped and fell (1) on wet floor (1)

Details of injury Swollen and twisted ankle (1)

Did first-aider attend?: Yes/~~No~~* (1) Was the injured person taken to hospital: Yes/~~No~~* (1)

Please state name of hospital

St Giles' Hospital (1)

Names of any witnesses to the accident Candidate's name (1)

Signature of person reporting accident Candidate's name (1) Date of exam (1)

* Please delete as appropriate

16 / 2 = 8 marks

FAX MESSAGE SHEET

LIGHTZONE & FOULGER
Educational Publishers
Curran House
SHEPWAY
SH7 6LD

Tel: 05671 8931
Fax: 05671 8932
E-mail: accounts@lightzonef.com

TO: O'Hara Security (1)

FAX NO: 04761-921734 (1)

FOR THE ATTENTION OF: (Mr) Paul Hussein (1)

FROM: Natasha Li (1)

DATE: Date of examination (1)

SUBJECT: Security Assessment Visit (1)

NO OF PAGES (including this page) 2 (1)

MESSAGE:

Confirm date of visit (ie day after the date of the examination) (1)
 Confirm time of visit (1)
 Confirm purpose of visit (1)
 Location map attached (1)

Signature of sender: Blank for Natasha Li to sign (1)

1 mark each to 12 / 2 = 6 marks

Office Procedures – Level 2

Syllabus objectives

The candidates should be able to:

1 Offices and their role in the organisation

1.1 Structure and functions

- Identify and describe the work of different departments within an organisation.
- Produce and interpret simple organisation charts.
- Explain how the work of an office varies according to the size of the organisation.

1.2 Personnel

- Identify the job roles of staff within the principal departments of an organisation, outlining their different duties and responsibilities.
- Explain the purpose and content of job descriptions, advertisements, application forms and CVs in the recruitment and selection process.
- Produce job descriptions and advertisements for given roles.

1.3 Health, safety and security

- Explain the duties and responsibilities in respect to health and safety at work on the part of employers, employees, safety officers and safety representatives.
- Explain the importance of maintaining security and confidentiality throughout the organisation (particularly the management of the reception area), eg building, personnel, valuable information.

2 Communications

2.1 Methods

- Select the appropriate method for different communication needs, eg urgency, length, confidentiality, complexity, legal reasons etc.

2.2 Interpersonal skills

- Give reasons for and methods of establishing and maintaining good relationships with staff at all levels, customers and visitors, including ways of dealing with difficult situations.
- Give reasons for and methods of efficiently dealing with customers' needs for information about the products and services of an organisation.
- Describe non-verbal communication signals.

2.3 Oral skills

- Identify the important points that need to be considered when receiving and making telephone calls.
- Create a telephone answering machine message that invites callers to leave a message.

2.4 Writing skills

- Compose a variety of business documents, eg standard letters, simple reports, advertisements, notices, instructions, memos, messages, using the appropriate format, style and tone.
- Use proof-reading skills to identify and mark errors appropriately in spelling, punctuation, figures, presentation and layout.

3 Office support services

3.1 Equipment

- Demonstrate knowledge and awareness of the range of equipment available to support the work of a modern office, eg for mail, copying, text and data processing, and explain how it is co-ordinated.
- Select appropriate equipment for given tasks and justify the selection.
- Explain routine maintenance and cleaning procedures.
- Identify ways of keeping equipment secure.

3.2 Telecommunications

- Describe the advantages and disadvantages of using different telecommunication methods eg fax, e-mail, telephone, mobile (cell phone) and possible problems that might occur.
- Explain methods of controlling the costs of telephone and data communications within an organisation.
- Outline the uses of answering machines within an organisation.

4 Business documentation and payment procedures

Candidates should be able to answer questions on both manual and computerised procedures in the following areas:

4.1 Prepare, interpret, check and explain the entries in documents used for:

- Buying and Selling – requisitions, letters of enquiry, price-lists, quotations, estimates, orders, invoices, credit notes, statements.
- Receipts and Payments – receipts, paying-in slips, cheques, credit transfers, direct debits, standing orders, credit/debit cards, expense claim forms.
- Stock Control – requisitions, inventories, stock control cards.

4.2 Outline procedures used and make calculations where appropriate for the following:

- Ordering office goods and services to include comparing quotations received from different suppliers and procedures for receiving goods.
- Reconciling incoming invoices and making payments to suppliers.
- Selling goods and services, including credit control.
- Receiving, verifying or recording payment.
- Issuing office materials and monitoring stock levels.
- Processing expenses claims for payment.
- Balance a petty cash account using the imprest system.

Identify and explain the banking services and procedures which may be used in the above.

Check, identify and correct errors in business documents.

Outline appropriate security and authorisation procedures.

5 Information and record handling

In **all** of the following areas candidates should be aware of both manual and electronic systems as appropriate.

5.1 Maintenance of an established filing system

- Identify and interpret classification systems.
- Describe methods for sorting, handling and storing documents, including microfilm (procedures and equipment).
- Explain and apply appropriate control mechanisms for ensuring the operation of an efficient and effective filing system, eg absence/out-guide and bring forward systems, cross-referencing, indexing.
- Describe procedures and systems for maintaining safety, security and confidentiality of information.
- Explain the need for a file retention policy.

5.2 Retrieval and presentation of information

- Identify different internal and external sources of information to an organisation eg:
Internal – intranet, organisation charts, files, general reference books, directories, records, operating manuals, databases, spreadsheets, microfiche, computerised held data, health and safety manual.
External – internet, telephone directories, reference books, maps.
- Extract and interpret information from a variety of formats, eg graphs, charts, diagrams, lists, tables.

6 Meetings and travel arrangements

6.1 Meetings

- Distinguish between formal and informal meetings.
- Identify the requirements for a formal meeting to be valid.
- Explain the purpose of different types of meeting, eg Annual General Meeting, Board meeting, departmental meeting.
- Identify and briefly explain different types of committee, eg executive committee, advisory committee, standing committee, ad hoc committee, sub committee.
- Identify and describe the duties and responsibilities involved in organising a meeting (before, during and after).
- Describe and prepare documentation required in connection with meetings, ie notice, agenda, Chairperson's agenda and brief minutes or report.
- Recognise standard meeting terminology and be able to define the principal terms, ie quorum, ex officio, co-opt, motion, amendment, rider, resolution, point of order, unanimous, verbatim.

6.2 Travel arrangements

- Identify relevant information sources, eg agencies, consulates, timetables, hotel guides, maps, directories.
- Give information on travel documentation, eg passports, visas, health certificates, insurance certificates, driving licences, travellers' cheques, credit cards, foreign currency.
- Plan journeys and prepare itineraries taking into account constraints, eg international time and climatic differences, time available, budgets.
- Request and confirm reservations for rooms and car hire.
- Describe actions to be taken to ensure smooth running of office during absence.

Office Procedures – Level 2

The examination

General points

The examination lasts for 2 hours. (Plus 5 minutes reading time) Note making during reading time is not allowed.

Competences and knowledge tested in Office Procedures Level 1 is expected.

Examination

The examination paper will be a question and answer booklet comprising two parts: Section A and Section B.

Section A – 12 short answer questions covering all sections of the syllabus.

Section B – scenario based integrated tasks covering a minimum of two sections of the syllabus, giving realistic background data and material for situation-based activities.

All questions and tasks are compulsory.

All final answers must be in blue or black ink.

Candidates must complete all tasks within the examination time.

Calculators and English and mother tongue dictionaries are allowed during the examination.

If additional separate sheets of paper are used, make sure they are clearly labelled with the candidate's name.

Assessment

Candidates' performance will be assessed as follows:

Section A – 60 marks will be awarded for correct answers to the short answer questions.

Section B – 40 marks will be awarded for the scenario based integrated tasks.

Candidates' answers are expected to demonstrate progression from the syllabus objectives tested in the Level 1 Office Procedures examination.

Marks for Sections A and B are aggregated at least 40% must be achieved in each section.

Section A: a minimum of 24 marks

Section B: a minimum of 16 marks

To be awarded a **Pass** candidates must achieve 55% (55 out of 100 marks)

A **First Class Pass** will be awarded to candidates who achieve 70% overall (70 out of 100 marks)

Standards

All examination papers are written to stringent test specifications. This means that each examination tests the same elements. All papers are then moderated to ensure that the standard is correct and there are not any problems with the topic or level of the language used.

Marking schemes

All examination papers have individual marking schemes which allow for a range of acceptable answers. Candidates who make valid points that differ from those on the marking scheme are awarded marks for them whereas candidates who write about the topic but do not answer the question receive no marks.

Although individual mark schemes allocate marks for content and style according to the requirements of the question, marks for the layout of standard documents are allocated as follows:

Memos	Correct format and layout To, From and Date are essential Memo, Ref, Headings are optional	maximum 2 marks
Reports	Correct format and layout. Heading/Title, To, From and Date are essential	maximum 2 marks
Letters	Correct format and layout Date, Addressee, Salutation and Complimentary Close are essential	maximum 2 marks

Weakness codes

The weakness report is helpful in deciding how much further practice is required by unsuccessful candidates before retaking the examination, and which skills require particular attention. Weaknesses are detailed on the results slip of unsuccessful candidates and on the results summary that is sent to the centres listing candidates results.

The examiner completes a weakness code as shown in the example below. Ticking those areas where a candidate has shown a particular weakness.

A Failed narrowly

Indicates that despite re-checking of borderline scripts, one or two too many errors have resulted in a fail. This code is used in conjunction with another Weakness Code.

B Question(s) not understood or misinterpreted

Used when it is obvious that candidates have misunderstood or misinterpreted a question due, in the main, to not reading it properly or reading it too quickly and not thinking before answering. Examples include giving employers' responsibilities instead of those of employees; stock control instead of stock requisition card; the requirements of a good filing system instead of the rules for carrying out filing.

C Knowledge of facts – restricted

This is evidenced in answers to questions requiring candidates to make a number of points and the same points are re-worded and repeated. Lack of knowledge is often apparent in questions requiring differentiation between vertical and lateral filing methods and trade and cash discounts.

D Comprehension/application – limited

Indicates imprecise or vague answers that display candidates either do not understand the questions or have insufficient knowledge and ability to answer them fully. Examples include inability to put business documents into the correct sequence when answering questions about the flow of documents and answers that omit essential information on the assumption that the marker will know what the candidate is writing about.

E Inability to apply knowledge appropriately

This code may be used to indicate candidates whose knowledge of the subject is good but who have not displayed the ability to use it in practical tasks, eg the completion of business documents. For example, candidates who know the meaning of the term 'unit price' but do not enter the unit price in the correct column of an invoice.

F Presentation – poor

Indicates scripts where the handwriting is illegible or there are untidy corrections or poorly completed business forms.

G Insufficient work submitted

Indicates that there were either too many gaps in a candidate's answers to gain sufficient marks to pass or some questions were accurately and completely answered but the paper was unfinished so that enough marks to pass was not possible.

H Answers contain irrelevant information

Refers to answers that relate to the theory of the topic in general rather than to the part of it that specifically relates to the question.

Office Procedures – Level 2

Advice to tutors

Syllabus

- Ensure full syllabus coverage – not just the parts learners enjoy.
- Build in plenty of time for revision throughout and at the end of the course.
- Make sure candidates know how to work out percentages and how to balance petty cash accounts.
- Ensure candidates are familiar with the format of the examination by working sample papers. These can be found at the end of this section and are downloadable from our website www.cityandguilds.com
- Mark and return candidates' work with advice on those areas where it is obvious that their understanding is weak and revision is necessary.
- Encourage candidates to use the Internet as a source of reference.
- The City & Guilds' learner portal www.smartscreen.co.uk contains some excellent information about career planning, writing CVs and job applications.
- If possible, take candidates on visits to offices and exhibitions and try to organise work experience in offices for them.

Examination

- Advise candidates to make the most of the reading time.
- Emphasise the importance of reading whole questions, highlighting key words and planning answers before commencing written answers.
- Advise candidates to keep an eye on the time to ensure they have sufficient to answer all of the questions and to carefully check their scripts
- When they check their scripts, impress upon them the need to neatly cross through workings, notes and other material they do not want marked.

Tips

- Provide plenty of time for revision.
- Teach candidates how to balance a petty cash account.
- Provide model answers to examination questions.
- Give candidates lots of practical activities/assignments throughout the course.
- Provide examples of some of the many different layouts of forms and documents and give candidates opportunities to complete them.
- Select questions requiring comparisons and judgements from Sample papers and discuss in class to aid candidates' understanding.

Office Procedures – Level 2

Advice to candidates

City and Guilds want candidates to achieve better results and the aim of this Guide is to provide the base of good practice and a clearer understanding of exactly what should be included in examination answers. It is hoped the following advice will help your candidates to succeed.

Syllabus

- You should have a knowledge and understanding of the whole syllabus.
- Keep a checklist of your course work, only ticking syllabus sections when you fully understand them.
- Make a list of the areas of the syllabus that cause you difficulty so that you can give them priority when you revise.
- Where possible, undertake work experience in an office.
- If you have a bank account, learn from your own personal experience of banking documentation/procedures.
- Use the Internet and your library – do not rely solely on one textbook.
- The City and Guilds' learner portal, www.smartscreen.co.uk contains information about career planning, writing CVs and job applications, that you should find helpful.

Practice

- Prepare thoroughly for the examination by learning and revising the full syllabus.
- Practise completing and balancing petty cash accounts, ie finalising one accounting period and opening up the next.
- Practise your proof-reading skills – do not just rely on a computer spell-check. In the examination you need to be able to spot incorrect spellings on your own.
- Questions that require the insertion of an exact date relative to that of the examination need practice. Marks are not awarded for stating 'in a month's time' or 'in a week's time' when the answer requires the actual date one month or one week before or following the date of the examination.
- Practise completing lots of different examples of sales and purchases documents.
- Repeat all the sections of the syllabus that you personally have found difficult.

During the examination

- Make the most of the 5 minutes' reading time to thoroughly study the questions so that you understand from the scenario the context in which many of the questions have been set.
- Read questions carefully and plan your answers before you start answering them.
- Study the marks for each question. The allocation of marks for each question or part of a question indicates how long you should spend on an answer.
- Carefully check your answers to all questions, ensuring you have answered all parts of them.
- Make sure your handwriting is legible and mistakes are neatly corrected.
- Make sure that final answers are in blue or black ink.
- Leave adequate time to check your work before the end of the examination.
- Make sure you cross out any work you do not want to be marked.

Tips

- Think before you answer!
- Pay attention to handwriting – if a marker cannot read yours you will get no marks.
- Re-read questions and highlight key words.
- Check that you have answered all questions
- Know the difference between **employer** and **employee**.
- Always ask your Tutor about anything you do not understand.

Office Procedures – Level 2

Sample examination paper

Office Procedures

Level 2

8965-12-012

(PR-OP 12)

SAMPLE 00004

This paper must be returned with the candidate's work, otherwise the entry will be void and no result will be issued.



Candidate's name (Block letters please)

Centre no

Date

Time allowed: 2 hours
(plus 5 minutes' reading time).

Section A Answer **all** 12 questions. Your answers should be written in the question booklet in the spaces provided.

Section B Answer **all** questions. Information required to help answer these questions is given in the Scenario.

All final answers must be in blue or black ink.

If additional separate sheets of paper are used, make sure each page is clearly labelled with your name.

Calculators and English and mother tongue dictionaries can be used.

For examiner's use only

Section A	Section B	Total
60	40	100

Section A

Answer **all** questions in this section – 60 marks.

- 1 a Briefly explain, with reasons, **two** advantages to large companies of organising photocopying services centrally.

(4 marks)

- b Place the following employees under the appropriate departments:

- Health and safety officer
- Receptionist
- Wages clerk
- Advertising manager.

Finance

Sales

Personnel

Administration/
Company Secretary

(4 marks)

- 2 List **two** pieces of health and safety information that should be given to new employees when they start a job.

(2 marks)

- 3 a Briefly explain **three** ways of dealing with difficult customers.

(3 marks)

- b List **four** methods of non-verbal communication.

(4 marks)

4 Security is vital when communicating confidential information. Briefly explain **one** way of maintaining security when using **each** of the following methods:

a Telephone

b Fax

c E-mail

(3 marks)

5 Briefly describe **three** points that should be included in guidelines for the maintenance and care of office equipment.

(6 marks)

6 State **four** advantages of using e-mail as a means of communication.

(4 marks)

7 Briefly explain **two** advantages of making payments using banks' credit transfer systems.

(4 marks)

8 List **six** points that should be considered when comparing quotations received from different suppliers.

(6 marks)

9 State **five** rules that should be followed to ensure that a paper filing system operates efficiently.

(5 marks)

10 a State **two** practical uses of a spreadsheet in an office.

(2 marks)

b List **three** examples of the type of information that can be found on an organisation's Intranet system.

(3 marks)

11 a List **three** items of business which may be conducted at an annual general meeting.

(3 marks)

b Briefly explain the following terms used in connection with meetings.

i Quorum

ii Point of order

(2 marks)

12 State **five** items of information needed before starting to make overseas travel arrangements on behalf of an employer.

(5 marks)

(Total 60 marks)

Section B

Answer **all** questions in this section – 40 marks.

Scenario

You work as an administrator for Intercom Technology Centre Ltd. A new trainee administrator, Leona Valentini, was recently appointed and you have been given the responsibility of assisting her and checking her work during her induction. You have the following tasks to deal with today:

- Proof-reading an information sheet
- Preparing a statement of account
- Writing the minutes of a meeting

1 Leona has typed the following Information Sheet, which is to be sent to customers. Check it carefully and circle the 20 errors she has made so that she can correct them.

(10 marks)

INTERCOM TECHNOLOGY CENTRE LTD



INFORMATION SHEET

Power Surges

Power surges and lightning strikes are not the only things that can damage your computer. simply switching it on and off can cause cumulative, permanent damage.

Using advanced design elements the Intercom Technology centre range offers the most complete protection from power surges

Battery Backups.

These provide surge protection and battery support for your computer.

The Intercom Technology BB4 monitors the input power and the AVR regulates any any voltage or frequency variations to maintain a clean and consistent power output.

System Requirements

The minimum specification your PC must meet to run the software. the faster your PC, and the memory it has, the smoother the software will run

Hard Drives

External drives are the easiest way to add extra storage capacity.

CD-RW Drives

These can be used for reading CDs and for writing/burning.

Zip Drives

Special disk drive for use with Zip disks only.

2 At your request, Leona has compiled the following list of invoices and credit notes that were sent to The Computerland Co Ltd, High St, Lincoln, LX3 2PD, last month. Using this information, complete the Statement of Account below.

(12 marks)

		£
1	Balance	236.00
7	Invoice S4381	145.00
11	Payment	236.00
15	Invoice S4392	834.50
25	Returns R92	162.75

STATEMENT OF ACCOUNT				
INTerCOM TECHNOLOGY CENTRE LTD Harpur Hill Oxford OX7 3SD				
To:				Date:
Date	Description	Debit £	Credit £	Balance £
1				
30	Closing Balance			

3 The manager of your department, Mr J Palmer, is chairperson of the company's Health & Safety Committee. The other four members of the committee are: Miss D O'Callaghan, Mr C Mulligan, Mrs J K Redford and Mr C Drewery.

During a meeting in the boardroom at 2.30pm yesterday, Mr Palmer made some notes on his copy of the agenda, shown below. He left the agenda on your desk with the following note; follow his instructions using the template on the opposite page.

Would you please prepare draft minutes of the H & S Committee Meeting for my approval. Thanks.

JP

(18 marks)

CHAIRPERSON'S AGENDA

Health & Safety Committee meeting – yesterday



AGENDA ITEM

NOTES

- | | |
|---|--|
| 1. Apologies for Absence –
C Mulligan on annual leave. | C Drewery also absent |
| 2. Minutes of previous meeting. | OK |
| 3. Matters arising –
New guidelines for computer users | C Mulligan working on this. Not yet received. Carry forward. |
| 4. Safety Officer's monthly report. | Fire-fighting equipment checked and serviced on 15 th last month.
All OK |
| 5. Any other business. | Staff using computers complaining of headaches. CD to investigate. |
| 6. Time and date of next meeting – suggest 7 th of next month. | Agreed, at 2.30pm |

MINUTES



Present:

Apologies for absence

Minutes of the previous meeting

Matters arising

Safety Officer's monthly report

Any other business

Date and time of next meeting

End of examination

Office Procedures – Level 2

Marking guide

Marking scheme – Sample 00004

Accept any other suitable answers

Calculations – apply own figure rule if error in original calculation – ie apply $\frac{1}{2}$ marks for follow-through.

Section A – 60 marks

- 1 a Specialist staff – more efficient use of staff hours/reduces number of staff required
Monitoring usage – prevents misuse
Fewer machines such as photocopiers are needed – saves capital
Machines used to full capacity – avoids under-use
Machines used only by trained staff – less likelihood of breakdowns
More even distribution of work – avoids some staff being extremely busy
2 marks each to a maximum of 4 marks
- b Finance – Wages clerk
Sales – Advertising Manager
Personnel – Health and Safety officer
Administration/Company Secretary – Receptionist
1 mark each to a maximum of 4 marks
- 2 Location of first-aid box
Name of first-aider and contact details
Safety officer (if any) and name
Procedure to be taken in case of fire
Location of accident book
How to report hazards
1 mark each to a maximum of 2 marks
- 3 a Always be polite and stay calm
Listen carefully and do not be aggressive
Ask client into an interview room if possible. If not, a quiet area.
Do not criticise own employer
Do not offer a solution which is outside your authority
If necessary, seek the advice of line manager
If necessary, call security
1 mark each to a maximum of 3 marks
- b Posture
Eye-contact
Gestures
Facial expressions
Appearance
1 mark each to a maximum of 4 marks
- 4 a **Telephone:** Ensure you cannot be heard by other staff or visitors – close doors or move to another room
Check caller is who they say they are by getting their details and calling them back
b **Fax:** Mark fax cover sheet as confidential
Phone recipient to warn you are sending a fax
Do not leave on machine for others to read
Fix locked box on machine so that incoming faxes cannot be read until box is unlocked
Securely file original outgoing and incoming fax messages
c **E-mail:** Use passwords
Check using correct email address before sending information
Keep screen positioned so that others cannot see it
Mark as confidential.
1 mark each to a maximum of 3 marks

- 5 Cleaning and maintenance must be done in accordance with appropriate manuals
 Operators should not eat, drink or smoke when using equipment
 Regular servicing should take place
 A procedure for faults should be established
 Operators should be appropriately trained to use equipment
 2 marks each to a maximum of 6 marks
- 6 Speed of delivery
 Can be sent to several people at once
 Cheaper than post
 Attachments can be included
 24 hour service/not reliant on time zones
 Password security possible
 Invites speedy response
 History of communication can be forwarded
 1 mark for each to a maximum 4 marks
- 7 Can pay several creditors with one cheque
 Saves expenses on envelopes and postage
 Much safer method of payment as money is transferred directly from one bank account to another
 Payee doesn't need to wait for cheque clearance
 Internet can be used – so 24 hour service
 1 mark for each to a maximum 4 marks
- 8 Price of goods
 Payment terms
 Quality of goods
 Delivery costs, if any
 Delivery date
 Whether sales tax, if any, included in price
 Discounts offered
 Guarantee
 After sales service
 Reputation of sales company
 1 mark each to a maximum of 6 marks
- 9 Check papers have been passed for filing
 Sort and group papers before filing
 All paper clips removed
 Check papers are being placed in correct file
 Papers placed neatly and squarely in file
 Papers arranged in chronological order with most recent papers on top
 Use absent files when files removed from cabinets/Keep record of when files removed follow up when necessary (tickler system)
 File daily
 Use cross references when file is known by more than one name
 Thin out files in accordance with company's retention file policy
 Lock filing cabinets at night or when leaving them for long periods
 Issue complete files only not separate papers
 1 mark each to a maximum of 5 marks

- 10 a Petty cash account
Wages calculations
Budgetary control
Balancing sales figures
Producing graphs/statistics
Banking

1 mark each to a maximum of 2 marks
- b Types of information:
Staff vacancies
Staff policies
Company information
Organisation charts
Health & safety guidelines
News updates
Information about personal entitlements
Training packages
Instruction manuals

1 mark each to a maximum of 3 marks
- 11 a Declaration of dividends
Election of directors
Election of auditors
Presentation of annual report & accounts
Chairman's review

1 mark each to a maximum of 3 marks
- b The minimum number of persons who must be in attendance to constitute a meeting
A question regarding the procedures at a meeting.

1 mark each to a maximum of 2 marks
- 12 Journey dates
Countries/places to be visited
Airline preferences (if any)
Class of travel, eg First, Business, Economy
Car hire
Insurance
Visa
Transport to airport
Medical requirements
Accommodation requirements
No. of passengers

1 mark each to a maximum of 5 marks

Total 60 marks

Section B – 40 marks

1

INTerCOM TECHNOLOGY CENTRE LTD

INFORMATION SHEET



Power Surges

Power surges and lightning strikes are not the only things that can damage your computer. Simply switching it on and off can cause cumulative, permanent damage.

Using advanced design elements the Intercom Technology Centre range offers the most complete protection from power surges.

Battery Backups

These provide surge protection and battery support for your computer.

The Intercom Technology BB4 monitors the input power and the AVR regulates any voltage or frequency variations to maintain a clean and consistent power output.

System Requirements

The minimum specification your PC must meet to run the software. The faster your PC, and the more memory it has, the smoother the software will run.

Hard Drives

External drives are the easiest way to add extra storage capacity.

CD-RW Drives

These can be used for reading CDs and for writing/burning.

Zip Drives

Special disk drive for use with Zip disks only.

1 mark each error to 20/2 = 10 marks

STATEMENT OF ACCOUNT



INTERCOM TECHNOLOGY CENTRE LTD

Harpur Hill
Oxford
OX7 3SD

To: The Computerland Co Ltd
High Street
Lincoln
LX3 2PD **(1)**

Date: Date of exam **(1)**

Date	Description	Debit £	Credit £	Balance £
1	Balance			236.00 (2)
7	Invoice S4381	145.00 (2)		381.00 (2)
11	Payment		236.00 (2)	145.00 (2)
15	Invoice S4392	834.50 (2)		979.50 (2)
25	Returns R92		162.75 (2)	816.75 (2)
30	Closing Balance			816.75 (2)

(1) (1)

24 / 2 = 12 marks

D R A F T (1)**MINUTES**

A meeting of the Health & Safety Committee was held in the Board Room on (day before examination date) at 2.30 pm.

1/2 mark each to 2 marks

Present:

Mr J Palmer (Chairperson) **(2)**

Miss D O'Callaghan **(1)**

Mrs J K Redford (Safety Officer) **(2)**

5 marks

Apologies for absence

Apologies were received from Mr C Mulligan and Mr C Drewery.

2 marks

Minutes of the previous meeting

These were approved and signed by the Chairman. ('ok' = no marks)

1 mark

Matters arising

The new Guidelines for computer users had not been received from Mr Mulligan **(1)** who was still working on them. It was agreed to carry this item forward to the next meeting. **(1)**

up to 2 marks

Safety Officer's monthly report

Mrs Redford reported that all of the fire-fighting equipment had been checked and serviced on the 15th of last month. All of the equipment was in a satisfactory condition.

up to 2 marks

Any other business

It was reported that staff using computers had been complaining of headaches. It was agreed that Mr Drewery would be asked to investigate this matter.

up to 2 marks

Date and time of next meeting

It was agreed that this would be held on (7th of month after month of exam) at 2.30pm

1 mark

Total 18 marks

Total 40 marks

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