

Learner Assessment Guidelines

Unit 122

Provide office reception services

Level 3: Credit 5: Version 5

Candidate Information (Candidate to complete on commencement)	
Candidate Name:	
Employer:	
NZQA No. (ROL):	DOB:
Signed:	Date:

Candidate Performance (Assessor use only)	
More evidence required. Follow up completed (Date):	
Suggest further training. Follow up completed (Date):	
Meets requirements:	
Name:	Assessor No.
Signed:	Date:

Learner Assessment Instructions

This is your Learner Assessment Pack for “Provide office reception services”. This is a Level 3 Unit Standard. This unit is worth 5 Credits.

As well as this candidate pack, you should also refer to the unit standard from the NZQA website (<http://www.nzqa.govt.nz>).

This pack contains:

- Task sheets for you to complete.
- A ‘Verification Form’ for completion by your Manager or Assessor.
- A copy of the ‘Observation Checklist’ that your Assessor will use to document observation of your performance in the reception area.
- Assessment Results that the Assessor will use to assess your competence.

Assessment Tasks:

The tasks in this assessment are designed to show your assessor that you can:

- Explain the receptionist function within an organisation.
- Provide reception services.
- Evaluate and maintain the reception area.

Sfrito would like to acknowledge Public Sector Training Organisation (PSTO) for the use of their Assessment Guidelines

What do I do now?

- Read the unit standard.
- Read through all the information contained in this Pack.
- Familiarise yourself with each Assessment Task and the instructions.
- Contact your Assessor, if necessary, to clarify anything you are unsure of.
- Contact your Assessor when you have finished the assessment tasks,
- Make sure you keep a written copy of your completed assessment task if you are sending the original copy to your Assessor.

Assessment Task One - Elements One and Two

This assessment is designed to assess your ability to:

- explain the reception function within an organisation, and
- demonstrate techniques for assisting internal and external clients with specific needs.

Task Instructions

- You will need to answer the supplied questions.
- These questions can be answered verbally or in writing. Discuss your preference with your Assessor.
- If you answer verbally your assessor will note your answers on your question sheet.
- If you complete them in writing your assessor may wish to ask further questions to clarify your responses, or to have you expand on your answers to meet sufficiency requirements.

Task One Questions

Learner: _____ Date: _____

Question One

Give a detailed explanation of at least three duties that help the receptionist interface with the public/clients and the organisation. Duties may include but are not limited to:

- receiving people coming into the organisation personally
- managing telephone enquiries
- ascertaining callers' requirements and providing information and/or directing them within the organisation
- presenting a positive image for the organisation
- providing a high standard of customer service.

Question Two

What are the key responsibilities of a receptionist that require the application of personal skills? Give detailed information on at least four. Responsibilities may include but are not limited to:

- receiving callers and processing enquiries
- screening callers
- making appointments
- managing telephone systems
- keeping telecommunication records
- providing information
- routine clerical and text processing duties
- maintaining the reception area.

Question Three

What are the policies and procedures in your organisation that relate to business and client confidentiality and discretion?

Question Four

What are the non-verbal communication factors that you use as a receptionist? Give detailed information on at least four. For each, say how the factor could be used to create either a positive or negative impact. Non-verbal communications may include but are not limited to:

- body language
- physical characteristics and appearance
- facial expressions
- gestures and body movements
- posture
- voice
- space
- physical environment
- time.

For example, list:

Factor	Positive Impact	Negative Impact
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Question Five

What responsibilities does the receptionist have in the areas of understanding and promoting the organisation and its products and services, and in retaining client support?

Question Six

What organisational policies and procedures and legislative requirements are there for establishing and maintaining a safe and healthy environment in the reception area?

Question Seven

What emergencies and crises may arise in your reception area? Identify three and, for each, explain what is the role of the receptionist should the emergency or crisis occur. These may include but are not limited to:

- emergency procedures for fire, earthquake, hold-up, bomb scare
- contact information for emergency services and for safety officer
- contact information
- procedures for medical and first aid emergencies.

Question Eight

What techniques can be used to assist internal and external clients with specific needs? Explain techniques for two different types of special needs situations. Specific needs may include, but are not limited to language interpretation, physical or intellectual disability, cultural sensitivity.

Assessment Task Two - Elements Two and Three

This assessment is designed to assess your ability to:

- provide reception services; and
- maintain the reception area.

Task Instructions

You will need to arrange for your assessor to observe you carrying out reception duties.

Your assessor is also likely to ask you a few questions related to your management of your time, the telephone system, and the reception area.

The assessor will use the 'Observation Checklist' to assess and record your performance. Read this through so you are aware of what your assessor will be looking for.

Your assessor may nominate somebody in your organisation to complete these observations if s/he is not readily available. In that case they must complete the enclosed Verification Form.

Observation Checklist
Unit Standard 122 v5 – Copy For Your Information

Candidate: _____

Observer: _____

Location: _____

Observer's Signature: _____ Date: _____

Observation	Comment
<p>Observe the candidate using the office facilities and/or systems</p> <p>Describe what you observed:</p> <ul style="list-style-type: none"> • recording appointments • managing diaries • maintaining reception records 	<p><i>Comments</i></p>
<p>Were all these completed according to organisational policies and procedures?</p>	<p>Yes / No</p>
<p>Observe the candidate prioritising and processing at least four requests for information. Such information may include but is not limited to:</p> <ul style="list-style-type: none"> • mission statement • corporate plan • annual reports • management and/or administrative policies, staff information • inter-organisational and inter-company connections • product and service information • client information. 	<p>List four requests that you observed being processed</p> <p>1 _____</p> <p>2 _____</p> <p>3 _____</p> <p>4 _____</p>
<p>Were all processed according to organisational requirements?</p>	<p>Yes / No</p>

Observation	Comment
Observe the candidate using the telephone system	Tick at least four of the following: <ul style="list-style-type: none"> <input type="checkbox"/> receiving and re-directing telephone calls <input type="checkbox"/> placing calls <input type="checkbox"/> operating voice mail systems <input type="checkbox"/> taking messages <input type="checkbox"/> operating telepaggers, facsimile, and answering machine <input type="checkbox"/> maintaining telecommunication records
Were all processed according to organisational requirements?	Yes / No
Observe the candidate demonstrating communication, interpersonal and time management skills with internal and external clients <i>Time management skills</i> include but are not limited to analysis of activities, prioritisation of tasks, budgeting of time, identification of time wasters, review use of time <i>Listening skills</i> include but are not limited to hearing, comprehending, remembering	Tick at least four of the following and make any other relevant notes below. <ul style="list-style-type: none"> <input type="checkbox"/> receiving people <input type="checkbox"/> greeting appropriately <input type="checkbox"/> welcoming enquiries <input type="checkbox"/> ascertaining requirements <input type="checkbox"/> providing assistance <input type="checkbox"/> receiving and relaying messages promptly <input type="checkbox"/> assuring confidentiality <input type="checkbox"/> treating people and information with respect <input type="checkbox"/> resolving conflicts <input type="checkbox"/> managing stress <input type="checkbox"/> working within a team <input type="checkbox"/> using listening skills <input type="checkbox"/> prioritising. <p><i>Further notes:</i></p>
Were all interactions conducted according to organisational policies and procedures?	Yes / No

Observation	Comment
<p>Observe the candidate demonstrating positive and suitable non-verbal communication in their interactions with internal and external clients</p> <p>This may include but is not limited to:</p> <ul style="list-style-type: none"> • body language • personal presentation • facial expressions • gestures and body movements • posture. 	<p><i>Comments</i></p>
<p>If the occasion arises, observe the candidate using techniques for assisting internal and external clients with specific needs</p> <p>Evidence is required of two different specific needs situations</p> <p>Specific needs may include but are not limited to</p> <ul style="list-style-type: none"> • cultural sensitivity • language interpretation • physical disabilities. 	<p><i>Comments</i></p>
<p>Were the techniques used in accordance with organisational policies and procedures?</p>	<p>Yes / No</p>
<p>Observe the candidate implementing procedures for maintaining an effective reception area in accordance with organisational policies and procedures</p>	<p><i>Comments</i></p>

Task Two Verification Form

(For use if the Assessor is not the Observer)

<i>Name of Candidate:</i>
<i>Name of Manager / Supervisor:</i>
<i>Position in relation to candidate:</i>
<i>Phone No:</i>
<i>Length of time you have managed or supervised the candidate:</i>
<p>The above candidate is currently being assessed for Unit Standard 122, Provide Office Reception Services.</p> <p>Your signature on this form is required to confirm that you have observed the candidate performing the reception tasks as listed in the Observation</p> <p>Form Signed: _____ Date: _____</p> <p><i>Thank you for your assistance!</i></p>

Assessment Task Three – Element Three

This Task is designed to assess your ability to evaluate the reception area.

Task Instructions

Evaluate the effectiveness of your reception area. In particular, analyse its effectiveness for the following:

- accessibility
- functionality
- environment
- security and safety requirements
- facilities for customers.

Give a report on your evaluation to your Assessor. Your report may be verbal or in writing. Regardless of the method used, include a sketch of the area below.

Assessment Results

Name of Candidate: _____

These are the judgements that your Assessor will use to assess you:

Has the candidate explained at least three receptionist functions in terms of their importance as an interface between the client and the organisation?	Yes	No
Has the candidate explained at least four key responsibilities and therefore skills required for the receptionist role?	Yes	No
Has the candidate explained the ethics for ensuring business and client confidentiality and discretion?	Yes	No
Has the candidate explained the significance of at least four non-verbal communication factors for the receptionist's role?	Yes	No
Has the candidate explained the receptionist's responsibilities for understanding and promoting the organisation and its products and services, and for retaining customers?	Yes	No
Has the candidate explained the requirements for a safe and healthy reception environment?	Yes	No
Has the candidate explained the additional responsibilities the receptionist has in the case of an emergency? Evidence of three required.	Yes	No
Can the candidate use office facilities and systems for recording appointments, managing diaries and reception records?	Yes	No
Can the candidate prioritise and process at least four requests in accordance with organisational policies and procedures?	Yes	No
Can the candidate operate at least four areas of the business telephone system?	Yes	No
Has the candidate demonstrated at least four communication, interpersonal and time management skills?	Yes	No
Can the candidate demonstrate positive and appropriate non-verbal communication skills when dealing with external and internal clients?	Yes	No
Can the candidate demonstrate techniques for assisting at least two internal or external clients with specific needs?	Yes	No
Has the candidate evaluated the reception area in terms of its accessibility, functionality, environment, security and safety, and facilities for customers?	Yes	No
Has the candidate implemented procedures for maintaining an effective reception area?	Yes	No