

Trainee's Assessment

Communicate information in a specified workplace

US 1277 V5

Level 2 Credits 3

Name _____

careerforce

Trainee's assessment

This trainee's assessment contains:

- Instructions for the trainee
- Assessment tasks
- Observation forms
- Guidelines for referencing
- Feedback form
- Assessment result sheet

Tips for the trainee

Before you start this assessment you must read the instructions.

The following colours show different areas of this assessment:

- **Green boxes:** sections to be filled out and usually signed – by you or someone else such as an assessor, verifier or supervisor.
- **Purple boxes:** areas for the assessor to write in. Please do not write in these boxes.
- **Grey boxes:** tasks where your answer is a demonstration.

A person assessed as competent in this unit standard is able to:

	Outcome	Task and evidence
Give information to clients in the workplace.	1	One – Demonstration (Grey)
Record and convey information in the workplace.	2	Two – Demonstration (Grey)
Respond to an inquiry in the workplace.	3	Three – Demonstration (Grey)

Acknowledgements: Careerforce acknowledges Learning State Limited's permission to adapt the assessment guide for this unit standard.

Instructions for the trainee

- Your responses to the assessment tasks need to show the assessor that you have a full understanding of the topic. The assessor may require you to discuss your responses.
- This assessment is “open book”, which means that you can use any information you wish when you are completing this assessment. This information may include learning materials, books, the internet and your organisation’s policies and procedures.
- You will be asked to carry out practical tasks. Your assessor or verifier will observe you and complete observation forms. The assessor/verifier may require you to perform tasks on more than one occasion.
- For any documents you supply, remove all identifying details of the people receiving services or support.
- When referring to theories and/or published documents, please acknowledge the published source. Guidelines for referencing are at the back

of this assessment.

- You need to show that your work complies with your organisation’s policies and procedures.
- If you require assistance with any aspect of the assessment, please contact your assessor.
- If you have a hearing impairment, you can be assessed using a sign language telephone interpreter.

Definitions of terms

The word **trainee** in this assessment refers to the person being assessed. Other terms that may be used are candidate, student or employee.

Client refers to a person accessing services in a health or disability setting in either a residential care facility or in a private home – the person’s own or a friend’s, group’s or family member’s. Other terms used for the person being supported include consumer, individual, resident, service user or tūroro.

An **organisation’s policies and procedures** are the policies and procedures of the trainee’s employer and include ethical codes, standards and other organisational requirements.

Workplace assessor or **assessor** means the person who will assess the trainee.

A **verifier** is a workplace supervisor or manager who understands the assessment, works closely with the trainee, and can confirm that the trainee has performed the task competently.

Abbreviations

ER refers to the evidence requirements of the unit standard – the evidence (descriptions, explanations, documents etc) that you must provide, and/or the actions that you must do or demonstrate.

MER means “more evidence required”.

References

- Your organisation’s policies and procedures.

Note

You must take into account any cultural differences when communicating with clients, and meet the requirements of the Privacy Act 1993.

You need to demonstrate giving information **orally** to a client or clients in your workplace in **two ways**:

- One telephone interaction.
- One face-to-face interaction.

Your telephone and face-to-face interactions may be with the same client or with two different clients.

An observer will fill in this checklist as you carry out this task. The observer may be your assessor or a verifier who can confirm that you have competently performed the task. The assessor or verifier may ask to observe you participating in more than two interactions.

While completing this task you must work within your organisation's policies and procedures, and meet the requirements of the Privacy Act 1993. You must take any cultural differences into account when communicating with other people.

Demonstration of giving information to a client

By telephone

The forms of address and identification that the trainee used fitted the workplace, the situation, the occasion, the medium (telephone) and the relationship between the trainee and the client.

The trainee clarified the needs of the client and took notes where information needed to be passed on.

Assessor's/verifier's use only
Notes and decision:



Two large, light purple rectangular boxes for notes and decision, each containing a white circle.

The information given to the client was complete and presented in a manner that met the client's expectations.

Feedback was sought in order to ensure that the client's needs were fully understood.

Any confidential information was treated with discretion, and in accordance with the relevant provisions of the Privacy Act 1993.

The interaction was completed in manner that met workplace requirements, and fitted (was appropriate to) the situation, the occasion, the medium (telephone) and the relationship between the trainee and the client.

Assessor's/verifier's use only
Notes and decision:



Demonstration of giving information to a client

Face to face

The forms of address and identification that the trainee used fitted the workplace, the situation, the occasion, the medium (face-to-face) and the relationship between the trainee and the client.

The trainee clarified the needs of the client and took notes where information needed to be passed on.

The information given to the client was complete and presented in a manner that met the client's expectations.

Assessor's/verifier's use only
Notes and decision:



Demonstration of giving information to a client

Feedback was sought in order to ensure that the client's needs were fully understood.

Any confidential information was treated with discretion, and in accordance with the relevant provisions of the Privacy Act 1993.

The interaction was completed in manner that met workplace requirements, and fitted (was appropriate to) the situation, the occasion, the medium (face-to-face) and the relationship between the trainee and the client.

Assessor's/verifier's use only
Notes and decision:



Three large, empty, light purple rectangular boxes stacked vertically, each containing a white circle on the right side, intended for assessor notes and decisions.

Assessor's feedback on the trainee's performance

Task One: Achieved <input type="radio"/> More evidence required <input type="radio"/>	Assessor's name:	Date:
Reassessment: Achieved <input type="radio"/> More evidence required <input type="radio"/>	Assessor's name:	Date:

You are required to demonstrate your ability to record and convey (pass on) information in your workplace. The recipient of this information could be any of a manager/supervisor, colleague (eg member of a support/multi-disciplinary team, or health professional), client or member of a client's family/whānau.

When carrying out this task you must work within your organisation's policies and procedures, and meet the requirements of the Privacy Act 1993. You must take any cultural differences into account when communicating with other people.

NB: Questions 1 and 2 are "scene-setters" to check that you understand your organisation's procedures around recording and conveying information, before demonstrating them in the workplace.

Record and convey information in the workplace

Question 1: Describe the procedures you must follow to store information in your workplace.

Question 2: Describe the procedures you must follow to convey (pass on) information in your workplace.

Assessor's/verifier's use only
Notes and decision:



Two large, empty rectangular boxes for notes and decision, each with a white circular marker on the right side.

Assessor's feedback on the trainee's performance

Task Two: Achieved <input type="radio"/> More evidence required <input type="radio"/>	Assessor's name:	Date:
Reassessment: Achieved <input type="radio"/> More evidence required <input type="radio"/>	Assessor's name:	Date:

You are required to demonstrate your ability to respond to inquiries in your workplace. You are to give **oral (verbal)** responses to **three** inquiries, and **written** responses to **three** inquiries. The person you respond to (“the recipient”) could be any of a manager/supervisor, colleague (eg member of a support/multi-disciplinary team, or health professional), client or member of a client’s family/whānau.

When carrying out this task you must work within your organisation’s policies and procedures, and meet the requirements of the Privacy Act 1993. You must take any cultural differences into account when communicating with other people.

For each of **three oral** responses, you will be assessed to ensure that:

- The information is clear in terms of the recipient’s needs.
- An oral response was the appropriate mode of communication in terms of the workplace, the subject matter and the recipient.
- Formatting conventions for oral responses including but not limited to register, tone and language were used appropriately in terms of workplace requirements.

For each of **three written** responses, you will be assessed to ensure that:

- The information is clear in terms of the recipient’s needs.
- A written response was the appropriate mode of communication in terms of the workplace, the subject matter and the recipient.
- Formatting conventions for written responses including spelling, punctuation and grammar were used appropriately in terms of workplace requirements.

Please attach copies of the written responses you gave to inquiries in the workplace.


Ensure that you have removed all identifying information such as the names of the people involved.

An observer will fill in observation forms as you carry out this task. The observer may be your assessor or a verifier who can confirm that you have competently performed the task. The assessor or verifier may require further oral or written responses from you if you do not meet the stated requirements.

On the observation form there is space for written comment about the nature of each inquiry and the trainee’s response to each inquiry.

Observation form for oral response 1 (to be completed by the assessor/verifier)

There is space for written comment about the nature of each inquiry, and how the trainee responded to each inquiry. If a trainee did not respond adequately or appropriately to any aspect of the inquiry, a brief comment **must** be given.

Trainee's name:	Name of workplace:	Date:
Nature of inquiry		
Demonstration of oral response to an inquiry in the workplace		Assessor's/verifier's use only Notes and decision:  or MER
The trainee provided information that was clear in terms of the recipient's needs.		<input type="radio"/>
An oral response was the appropriate mode of communication in terms of the workplace, the subject matter and the recipient.		<input type="radio"/>
The trainee followed the formatting conventions for oral responses, including but not limited to register, tone and language, and used them appropriately in terms of workplace requirements.		<input type="radio"/>

Observation form for oral response 2 (to be completed by the assessor/verifier)

There is space for written comment about the nature of each inquiry, and how the trainee responded to each inquiry.

If a trainee did not respond adequately or appropriately to any aspect of the inquiry, a brief comment **must** be given.

Trainee's name:	Name of workplace:	Date:
Nature of inquiry		

Demonstration of oral response to an inquiry in the workplace

The trainee provided information that was clear in terms of the recipient's needs.

An oral response was the appropriate mode of communication in terms of the workplace, the subject matter and the recipient.

The trainee followed the formatting conventions for oral responses, including but not limited to register, tone and language, and used them appropriately in terms of workplace requirements.


Assessor's/verifier's use only
Notes and decision:



	<input type="radio"/>
	<input type="radio"/>
	<input type="radio"/>

Observation form for oral response 3 (to be completed by the assessor/verifier)

There is space for written comment about the nature of each inquiry, and how the trainee responded to each inquiry. If a trainee did not respond adequately or appropriately to any aspect of the inquiry, a brief comment **must** be given.

Trainee's name:	Name of workplace:	Date:
Nature of inquiry		
Demonstration of oral response to an inquiry in the workplace		Assessor's/verifier's use only Notes and decision:  or MER
The trainee provided information that was clear in terms of the recipient's needs.		<input type="radio"/>
An oral response was the appropriate mode of communication in terms of the workplace, the subject matter and the recipient.		<input type="radio"/>
The trainee followed the formatting conventions for oral responses, including but not limited to register, tone and language, and used them appropriately in terms of workplace requirements.		<input type="radio"/>

Observation form for written response 1 (to be completed by the assessor/verifier)

There is space for written comment about the nature of each inquiry, and how the trainee responded to each inquiry.

If a trainee did not respond adequately or appropriately to any aspect of the inquiry, a brief comment **must** be given.

Please attach a copy of the written response given to the inquiry. Ensure that all identifying information is removed.

Trainee's name:	Name of workplace:	Date:
Nature of inquiry		

Demonstration of written response to an inquiry in the workplace

The trainee provided information that was clear in terms of the recipient's needs.

A written response was the appropriate mode of communication in terms of the workplace, the subject matter and the recipient.

The trainee followed the formatting conventions for written responses, including but not limited to spelling, punctuation and grammar, and used them appropriately in terms of workplace requirements.

Assessor's/verifier's use only
Notes and decision:



	<input type="radio"/>
	<input type="radio"/>
	<input type="radio"/>

Observation form for written response 2 (to be completed by the assessor/verifier)

There is space for written comment about the nature of each inquiry, and how the trainee responded to each inquiry. If a trainee did not respond adequately or appropriately to any aspect of the inquiry, a brief comment **must** be given. Please attach a copy of the written response given to the inquiry. Ensure that all identifying information is removed.

Trainee's name:	Name of workplace:	Date:
Nature of inquiry		

Demonstration of written response to an inquiry in the workplace


The trainee provided information that was clear in terms of the recipient's needs.

A written response was the appropriate mode of communication in terms of the workplace, the subject matter and the recipient.

The trainee followed the formatting conventions for written responses, including but not limited to spelling, punctuation and grammar, and used them appropriately in terms of workplace requirements.

Assessor's/verifier's use only

Notes and decision:


or MER

Observation form for written response 3 (to be completed by the assessor/verifier)

There is space for written comment about the nature of each inquiry, and how the trainee responded to each inquiry.

If a trainee did not respond adequately or appropriately to any aspect of the inquiry, a brief comment **must** be given.

Please attach a copy of the written response given to the inquiry. Ensure that all identifying information is removed.

Trainee's name:	Name of workplace:	Date:
Nature of inquiry		

Demonstration of written response to an inquiry in the workplace

The trainee provided information that was clear in terms of the recipient's needs.

A written response was the appropriate mode of communication in terms of the workplace, the subject matter and the recipient.

The trainee followed the formatting conventions for written responses, including but not limited to spelling, punctuation and grammar, and used them appropriately in terms of workplace requirements.

Assessor's/verifier's use only
Notes and decision:



	<input type="radio"/>
	<input type="radio"/>
	<input type="radio"/>

Assessor's feedback on the trainee's performance

Task Three: Achieved <input type="radio"/> More evidence required <input type="radio"/>	Assessor's name:	Date:
Reassessment: Achieved <input type="radio"/> More evidence required <input type="radio"/>	Assessor's name:	Date:

Guidelines for referencing

If you refer to a theory, document, publication or website in your assessment material, you need to provide a reference for that source of information. The complete list of your references is known as a reading list or bibliography. To assemble a reading list, either use the referencing style shown here – adapted from the internationally-established system known as “APA referencing” – or use any other system that is consistent and provides all the necessary information.

In general:

- List all your references together in alphabetical order in accordance with the first main word, whether this is the author’s surname or the first word in the name of the publishing organisation or the title.

- Copy the exact wording of the title and the correct spelling of all names.
- Use punctuation and capitalisation as shown in the examples below.
- The place of publication is a city. Add the country if needed for clarity.
- If you are typing, put main titles *in italics*. Use a hanging indent for entries – see examples below. (Select your whole list then press Ctrl T on the keyboard.)
- If you are writing by hand, underline the main titles. Leave a blank line between each reference.
- If you found a document online, use the referencing styles below and add the date of retrieval (the date that you accessed the information) and the full URL address of the website as it appears in your browser.
- If the publication is in a format other than print or online, for example a DVD, add this description in brackets at the end of the entry.

For more detailed guidance and examples, see: Massey University. Last updated 09/06/2011, *APA style*, Retrieved 02/09/2011, <http://owl.massey.ac.nz/referencing/apa-style.php>

Publication by one or more author or editor

Style	Author’s or editor’s surname, initial. (Ed.) [if edited]. (Year of publication in brackets). <i>Title [in italics, only the first word is capitalised]: Subtitle [optional, only the first word is capitalised].</i> Place of publication: Publisher.	Example	Chapman, J. & White, T. (1995). <i>A guide to effective consumer participation in mental health services</i> . Wellington: Ministry of Health.
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Document or publication by an organisation – For example, a government document or an organisation’s policies and procedures. If there is no named author, give the organisation as both the author and the publisher.

Style	Organisation. (Year of publication in brackets). <i>Title [in italics, only the first word is capitalised]: Subtitle [optional, only the first word is capitalised].</i> Place of publication: Organisation.	Example	Ministry of Health. (2010). <i>New Zealand influenza pandemic plan: A framework for action</i> . Wellington: Ministry of Health. Careerforce. (2009). <i>Health and safety manual</i> . Christchurch: Careerforce.
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Guidelines for referencing

Legislation – Correct titles and dates of New Zealand legislation are at: <http://www.legislation.govt.nz/>

Style	Title Year.	Example	Health and Safety in Employment Act 1992.
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Standards – Correct titles and dates of New Zealand standards are at: <http://www.standards.co.nz/>

Style	NZS number:year <i>Title [in italics]</i> .	Example	NZS 8134.0:2008 <i>Health and disability services Standards – Health and disability services (general) Standard.</i>
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Codes of practice

General style	Organisation. Title Year (shorter more frequently used name, if this exists).	The most commonly referenced code	Health and Disability Commissioner. (Code of Health and Disability Services Consumers' Rights) Regulations 1996 (The Code of Rights).
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Website or webpage – This is when you are referring to an actual website. If you are referring to a document or publication found on a website, use the system for those documents and add the date of retrieval and the full URL address of the website as it appears in your browser.

Style	Author(s) [if known, or Organisation]. Year of publication or date of last update, <i>Title [in italics]</i> , date of retrieval, full URL address from your browser	Example	Massey University. Last updated 09/06/2011, <i>APA style</i> , Retrieved 02/09/2011, http://owll.massey.ac.nz/referencing/apa-style.php
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A source within a publication – For example, an article in a newspaper, magazine or journal.

Style	Author of article's surname, initial. (Year of publication in brackets). Article title [not in italics], <i>Publication title [in italics]</i> , <i>volume and issue number [in italics]</i> , [or newspaper date, not italics], page number/s.	Example	McPherson, K. M., Kayes, N., & Weatherall, M. (2009). A pilot study of self-regulation informed goal setting in people with traumatic brain injury, <i>Clinical Rehabilitation</i> , 23(4), 296–309.
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Instructions for the trainee

When you have finished the assessment

- Please give your completed assessment and any additional material to your assessor. You might like to make a copy for your records.
- When you have been assessed as having achieved this unit standard, the results will be sent to Careerforce for registering credits on the New Zealand Qualifications Framework.
- Your assessor will give your assessment material back to you. Please keep it safe.
- If you wish to appeal against the assessment result or process, you should complete an “Appeal of Trainee Assessment Result Form”. This form can be downloaded from the Shortcuts/Forms/ Trainee Forms section of the Careerforce website www.careerforce.org.nz
- **Please complete the trainee’s declaration below.**

Trainee’s declaration

I was told about and understood the assessment requirements.

I have prepared my answers myself.

I agree that this document can be photocopied for the purpose of moderation, as part of quality control processes.

I agree that once the assessment decision has been made, my personal details and results will be sent to Careerforce for registering credits on the New Zealand Qualifications Framework.

Trainee’s signature:

Trainee’s name (please print):

Date:

US 1277 V5 – Communicate information in a specified workplace

Please complete this feedback form to help us to improve our assessments.

Please respond to the questions with a tick in the relevant circle and with comments in the boxes

	Yes	No	Sometimes
Did you think the assessment booklet was well laid out?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Did you find the assessment questions easy to understand?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

What did you most like about this assessment?

What did you least like about this assessment?

If you could change something to improve this assessment, what would it be?

Additional comments:

Contact details (optional)

Name:	Workplace:
Phone:	Email:

When you have completed this page, please pull it out, fold it in three, secure it with tape and send it (Freepost) to: Careerforce, PO Box 25 255, Christchurch 8144 Fax (03) 371 9285

Freeport Authority CONSULT

Careerforce

PO Box 25 255

Christchurch 8144

US 1277 V5 – Communicate information in a specified workplace

Level 2 Credits 3

Assessment result sheet (completed by assessor)

Trainee's information	
Name:	
Employer:	
NZQA/NSI number (ROL):	Date of birth:

Trainee's performance summary

Assessment tasks	Achieved
Task One	<input checked="" type="radio"/>
Task Two	<input checked="" type="radio"/>
Task Three	<input checked="" type="radio"/>

Comments/feedback to the trainee

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Assessment result

I have assessed the trainee and confirm:

The requirements have been met to demonstrate competency in 1277 V5.

Name:	Assessor's number:
Signed:	Date:

For the credits to be registered on the New Zealand Qualifications Framework, send a copy of this form to:
Training Support Team, Careerforce, PO Box 25 255, Christchurch 8144

Training Support Team

Careerforce

PO Box 25 255

Christchurch 8144