



Unit Title:	Technical Advice and Guidance
OCR unit number:	225
Level:	4
Credit value:	15
Guided learning hours:	90
Unit reference number:	Y/500/7345

Candidates undertaking this unit must complete real work activities in a work environment. Simulation is only allowed in exceptional circumstances (please refer to the centre handbook for further details).

Unit aim and purpose

The learner will be in a role which involves providing, and controlling the provision of, advice and guidance. This is the ability to identify a need for technical advice or guidance, and to provide accurate information in a controlled process. Advice and guidance in the context of ICT will normally relate to the provision of technical information in order to resolve problems or to improve performance. Customers are defined as any person or organisation in need of technical advice. At this level providing advice and guidance may be referred to as "consultancy" or "technical specialism". Consultancy will normally refer to strategic advice, and technical specialism will refer to specific operational or product advice.

In order to provide effective advice it may be necessary to research and validate information.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p>The Learner will:</p> <p>1 Control the provision of technical advice and guidance</p>	<p>The Learner can:</p> <p>1.1 Ensure that organisational procedures for providing technical advice and guidance are followed.</p> <ul style="list-style-type: none"> • resolve problems • improve performance <p>1.2 Describe the types, sources and applicability of information which can form the basis of technical advice and guidance:</p> <ul style="list-style-type: none"> • information from reference sources (e.g. manuals, handbooks, manufacturer's specifications) • information derived from the analysis of data (e.g. trend analysis, fault logs) 	<ul style="list-style-type: none"> • The candidate must have a thorough understanding of: <ul style="list-style-type: none"> - The organisational procedures for providing technical advice and guidance within their organisation - The types, sources and applicability of a wide range of information which can be used to support technical advice and guidance - The procedures and constraints which can be applied when providing technical advice and guidance - The situations when technical advice and

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	<ul style="list-style-type: none"> • online information (e.g. manufacturer's websites, technical for a, discussion groups) <p>1.3 Describe the procedures and constraints which can apply to the provision of technical advice and guidance (e.g. escalation, commercial/contractual, legal/regulatory, information security)</p> <p>1.4 Identify circumstances where technical advice and guidance should be provided proactively rather than reactively in response to customer requests (e.g. to rectify known faults, to provide new functionality)</p>	<p>guidance should be proactive as opposed to reactive.</p>
<p>2 Provide reactive technical advice and guidance to customers on a range of topics.</p>	<p>2.1 Determine the purposes for which technical advice and guidance is required</p> <p>2.2 Verify that customers are entitled to receive the requested technical advice and guidance</p> <p>2.3 Communicate effectively with customers to elicit sufficient information to enable correct technical advice and guidance to be provided</p> <p>2.4 Source and interpret relevant technical information to produce advice and guidance in response to customer requests</p> <p>2.5 Communicate technical advice and guidance to customers in a format and style which meets their needs, confirming customer understanding of the information provided</p> <p>2.6 Follow organisational procedures for responding to customer requests including the timely escalation of those for which technical advice and guidance can not be</p>	<ul style="list-style-type: none"> • Candidates must know how to: <ul style="list-style-type: none"> - Determine the purpose when technical advice and guidance is required - Verify that the customers are entitled to the support - Communicate effectively with a wide range of customers of differing knowledge and skills - Source and interpret technical information in order to provide appropriate support • Candidates must have a thorough understanding of the organisational procedures to be followed when providing technical advice and guidance.

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	provided or does not resolve the request	
3 Provide proactive technical advice and guidance to customers	3.1 Identify the purposes for which the technical advice and guidance is required 3.2 Identify the customers, and their level of technical knowledge, to whom the technical advice and guidance should be provided 3.3 Develop technical advice and guidance in a format and style which takes into account the customers' level of technical knowledge 3.4 Follow organisational procedures for providing proactive technical advice and guidance	<ul style="list-style-type: none"> • The candidates must have a detailed understanding of: <ul style="list-style-type: none"> - The rationale behind technical advice and guidance - How to identify the technical knowledge, skills and understanding of the customer - The range of communication techniques which can be deployed in order to support the needs of a wide range of customers - The procedures to be followed when providing proactive technical advice and guidance.

Assessment

Candidates undertaking this unit must complete real work activities in order to produce evidence to demonstrate they are occupationally competent. Real work is where the candidate is engaged in activities that contribute to the aims of the organisation by whom they are employed, for example in paid employment or working in a voluntary capacity.

Simulation is only allowed for aspects of units when a candidate is required to complete a work activity that does not occur on a regular basis and therefore opportunities to complete a particular work activity do not easily arise. When simulation is used, assessors must be confident that the simulation replicates the workplace to such an extent that candidates will be able to fully transfer their occupational competence to the workplace and real situations.

Internal quality assurance personnel must agree the use of simulated activities before they take place and must sample all evidence produced through simulated activities.

It is the assessor's role to satisfy themselves that evidence is available for all performance, knowledge and evidence requirements before they can decide that a candidate has finished a unit. Where performance and knowledge requirements allow evidence to be generated by other methods, for example by questioning the candidate, assessors must be satisfied that the candidate will be competent under these conditions or in these types of situations in the workplace in the future. Evidence of questions must include a written account of the question and the candidate's response. Observations and/or witness testimonies must be detailed and put the evidence into context ie the purpose of the work etc.

All of the assessment criteria in the unit must be achieved and clearly evidenced in the submitted work, which is externally assessed by OCR.

Evidence for the knowledge must be explicitly presented and not implied through other forms of evidence.

Evidence requirements

All aspects of the assessment criteria must be covered and evidence must be available that shows where and how the assessment criteria have been achieved.

Assessment criterion 1

This unit incorporates performance and knowledge. For AC1.1, the learner should provide evidence of how they ensure that organisational procedures are followed when providing technical advice and guidance. Evidence could include a personal statement, report, professional, witness testimony supported by documentary evidence.

Learners must describe the types, sources and applicability of information which can form the basis of technical and advice and guidance. The evidence should be wide ranging, showing a depth of research and understanding.

The learners should consider their own organisation and describe the procedures and constraints that applies to the provision of technical advice and guidance.

Learners are required to identify situations where they the provision of technical advice and guidance should be proactive as opposed to reactive. The learner should draw on examples from their own organisation and working environment.

Assessment criterion 2

Learners must provide evidence of providing a wide range of reactive technical advice and guidance to customers of their organisation. The evidence could include reports, personal statements, professional discussions, detailed assessor observations, detailed witness testimonies, all supported by documentary evidence. The evidence must confirm that the learner can carry out the role competently, using good communication skills whilst following organisational procedures. A wide range of examples should be drawn from the learner's working environment within the organisation.

Assessment criterion 3

Learners must provide evidence of providing a wide range of proactive technical advice and guidance to customers of their organisation. The evidence could include reports, personal statements, professional discussions, detailed assessor observations, detailed witness testimonies, all supported by documentary evidence. The evidence must confirm that the learner can carry out the role competently, using good communication skills whilst following organisational procedures. A wide range of examples should be drawn from the learner's working environment within the organisation

Guidance on assessment and evidence requirements

You should refer to the '*Admin Guide: Vocational Qualifications (A850)*' for *Notes on Preventing Computer-Assisted Malpractice*.

Resources

The learner should conduct effective research to evaluate the wide range of IT diagnostic tools available. This should include the cost, functionality and compatibility. They should also undertake wider reading from a variety of maintenance and fault repair book that are available eg PC + Hardware Maintenance and Repair (Professional Series) by Michael Graves; A+ Computer Maintenance.

Additional information

For further information regarding administration for this qualification, please refer to the OCR document '*Admin Guide: Vocational Qualifications*' (A850) on the OCR website www.ocr.org.uk .