OCR
Oxford Cambridge and RSA

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| **Unit Title:** | **Process information about customers** |
| OCR unit number: | 45 |
| Level: | 2 |
| Credit value: | 3 |
| Guided learning hours: | 14 |
| Unit reference number: | R/506/2134 |

## Unit aim and purpose

This unit aims to develop the knowledge and skills required to process customer information. Upon completion of this unit, learners will be able to process customer information.

| Learning Outcomes | Assessment Criteria | Additional Guidance |
|---|---|---|
| **The Learner will:** | **The Learner can:** | |
| 1 Understand how to process customer information | 1.1 Describe the functions of customer information systems | |
| | 1.2 Explain the way in which **legislation and regulatory requirements** affect the processing of customer information | The explanation should specifically identify appropriate **legislation and regulatory requirements** |
| | 1.3 Explain different **responsibilities and levels of authority** for processing customer service information | |
| | 1.4 Explain **the reliability of sources** of customer information | The learner should be able to give examples of **sources of information** and make comparisons about their respective **reliability** |
| | 1.5 Explain the validity of customer information | |
| 2 Be able to process customer information | 2.1 Record information about customers in line with **organisational standards and procedures** | Where possible, adherence to **organisational standards, policies and procedures** should be confirmed by a line manager or experienced colleague |
| | 2.2 Keep customer information up to date | |
| | 2.3 Respond to requests for customer information from **authorised people** in a **timely manner** | The learner should be able to differentiate between **authorised** and unauthorised **people**<br>**Timely manner -** in line with organisational procedures |
| | 2.4 Retrieve customer information that meets the requirements of the request | |

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| Learning Outcomes | Assessment Criteria | Additional Guidance |
|---|---|---|
| | 2.5 Supply customer information in a **format** appropriate for the recipient<br>2.6 Adhere to **organisational policies and procedures, legal and ethical requirements** when processing customer information | Where possible, adherence to **organisational policies and procedures** should be confirmed by a line manager or experienced colleague. Learners should also be aware of *which* **legal requirements** affect their activities |

## Assessment

This unit is internally assessed by centre staff and externally verified by OCR Assessors.

## Guidance on assessment

**AC1.1** - The description of customer information systems should be in relation to the customer information systems in use at the learner's place of employment

**AC 1.3** - The learner should be able to explain their own responsibilities and level of authority and have an understanding of when and what to refer to others

**AC2.5** - Where an organisation adopts a standardised format for supplying customer information, over which the learner has no control, this AC can be met by 'what if' scenarios

Skills CFA Assessment Strategy Competence units (S/NVQ)

## National Occupational Standards (NOS) mapping/signposting

The mapping in the table below provides an indication of where evidence might be available for assessment against some of the knowledge and understanding contained in the national occupational standards (NOS). It does not claim to guarantee that evidence will meet the NOS.

NOS can be viewed on the relevant Sector Skills Council's website or the Occupational standards directory at www.ukstandards.co.uk.

| Occupational standards | Unit number | Title |
|---|---|---|
| Customer Service (2013) National Occupational Standards: | CFACSA6 | • Process information about customers |

## 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 .


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