



# Evidence Booklet

OCR Award and Certificate in Employability Skills

10399/10400/10401/10402/10403/10404

Unit 2: Learn about managing money



Version 2

# Evidence Booklet

## Unit 2: Learn about managing money

**Candidate's name (Block capitals)** \_\_\_\_\_

Instructions to candidates

Read the instructions carefully and complete all tasks in this booklet.

Make sure that your writing is clear and legible.

When your evidence booklet is complete, sign and date the following declaration.

**I confirm that**

- the work in this booklet is my own work
- I have not copied from anyone or any other sources
- I have not allowed anyone to copy my work.

Candidate's signature..... Completion date.....

**Centre assessor's name (Block capitals)** \_\_\_\_\_

**I confirm that I have read the Introduction for Tutors overleaf.**

I confirm that I have authenticated the candidate's work and am satisfied that to the best of my knowledge the work produced is solely that of the candidate.

I confirm that

- all tasks have been completed
- I have marked the work following the evidence requirements
- the work meets the assessment criteria.

Centre assessor's signature.....Completion date.....

(If applicable)

**Internal quality assurer's (IQA) name (Block capitals)** \_\_\_\_\_

**I confirm that I have checked this booklet and agree with the assessment decision.**

IQA's signature..... Date of quality assurance.....

(If applicable)

**Scribe's name(Block capitals)** \_\_\_\_\_

I confirm that I have transcribed the candidate responses using their own words.

**Scribe's signature**..... **Date**.....

# Introduction for tutors

The purpose of this evidence booklet is to provide a simple and manageable solution for gathering evidence for Unit 2 of these qualifications.

## ASSESSMENT AND QUALITY ASSURANCE

**Tutors may change any task or part of a task to make the context more appropriate for their learners. However, alternative tasks must meet the assessment criteria.**

**Alternative evidence guidelines are provided on Page 3.**

All evidence **must** be marked before submission. This should be indicated through a tick and/or feedback comment on each answer. Centre assessors must use the OCR evidence requirements for the unit when assessing the work. Tutors should check that there are no gaps in the evidence. Incomplete evidence must not be submitted. The relevant Assessment Criterion (AC) is listed against the title of each Task.

Witness statements **must** be fully completed by the witness (ie tutor, assessor, supervising person). Candidates **must not** complete any part of the witness statements.

Scribed work **must** be annotated with the scribe's initials. If candidates require a scribe, further guidance can be found in the JCQ document: *Access Arrangements, Reasonable Adjustments and Special Consideration 2014-2015*. The application form for reasonable adjustments is available to download from the JCQ website: <http://www.jcq.org.uk/exams-office/access-arrangements-and-special-consideration/forms/form-vq-ia>

Centres should have an internal standardisation process in place to ensure consistency of assessment across assessors. For further guidance refer to the Centre Handbook which is available to download from the OCR website: [www.ocr.org.uk](http://www.ocr.org.uk)

## SUBMITTING EVIDENCE

Answers should be individual to the candidate and his/her own work. Staple together the tasks in numerical order. Do not submit evidence booklets in folders or plastic pockets. Do not submit group coursework, handouts or downloads.

Alternative evidence should be securely attached to the evidence booklet. Alternative evidence guidelines are provided on Page 3.

All evidence submitted must be legible. If evidence is scanned for electronic submission, please ensure that the scanned copy is clearly legible and that pages are in the correct sequence and orientation. Declarations on the front sheet **must** be signed and dated; a 'typed' signature is not acceptable.

A Candidate Submission Sheet must be completed in line with OCR Administration Guide. The sheets are available to download from the qualification pages on the OCR website: [www.ocr.org.uk](http://www.ocr.org.uk)

**Please note** that OCR is unable to return candidate work to centres, so centres may wish to take a copy before submitting evidence.

## FEEDBACK TO CENTRES

Examiner-moderators will complete an electronic Centre Feedback Report Form (e-NQF6) for each batch submitted. Reports are accessed through OCR Interchange.

## KEEPING UP-TO-DATE

Occasionally OCR may up-date these booklets and assessment guidance. Please refer to the relevant qualification page on our website: [www.ocr.org.uk](http://www.ocr.org.uk) for the most up-to-date version.

## Task 1 (AC 1.1, 1.2 and 1.3)

### Your Bank Plc

*Account name*            GEORGIA BOGUSZ  
*Account number*            1782346109  
*Branch*    31 Wood Street, Coventry

***Summary for 20 Nov – 21 Dec 2014***  
Start balance                    £ 5.19  
Total in                            £ 1015.80  
Total out                          £ 105.59  
**End balance                    £ 915.40**  
Overdraft limit                  £500.00  
Credit interest rate              14.9% PA

753    H131 VNB            27 854    11934

MS G BOGUSZ  
28 FOREST ROAD  
COVENTRY  
CV2 2PL

Sort Code 40 44 38

### Transactions

Date	Description	Details	Money out	Money in	Balance
19 Nov	Start balance				5.19
21 Nov	Salary BACS			915.80	920.99
3 Dec	Deposit at Your Bank	Cash		100.00	1020.99
5 Dec	Cashpoint Trent Street	Withdrawal	40.00		980.99
5 Dec	Payment to Jerome's	Debit Card purchase	29.90		951.09
7 Dec	Payment to Tesco	Debit Card purchase	15.70		935.39
13 Dec	Payment to BHS	Debit Card purchase	19.99		915.40
20 Dec	End balance				915.40

Your Bank plc  
P.O. Box No. 99  
London

## Task 1a

The financial document shown on Page 4 is a .....

## Task 1b

State the purpose of the document shown on Page 4.

## Task 1c

Using the financial document from Page 4, complete the table below.

Question	Answer
<i>e.g. What is the account number?</i>	1782346109
What is the sort code?	
How much money was paid to Tesco on 7th Dec?	
What was the method of payment to BHS?	
What is the end balance?	

## Task 1d

Details		Deductions		Payment	
EMPLOYEE	KACEY FARRELL	PENSION	63.70	HRS O/T	0
NI	NY 35 40 97 D	INCOME TAX	138.00	OTHER	0
TAX PERIOD	2015	NATIONAL INSURANCE	77.67	BONUS	0
PAY DATE	25/01/15	OTHER DEDUCTIONS	0	SSP/SMP	0
TAX CODE	522L	TOTAL	279.37	BASIC	1150.00
GROSS WAGES T/D	2000.00			GROSS	1150.00
TAX PAID T/D	319.07			DEDUCTIONS	279.37
				TAX CREDITS	0
				NET PAY	870.63
					BACS

The financial document above is an example of a .....

## Task 1e

State the purpose of the document from Task 1d.

.....

.....

## Task 1f

Using the financial document from Task 1d, complete the table below.

Question	Answer
<i>e.g. What is the National Insurance Number?</i>	N7 35 40 97 D
What is the National Insurance deduction?	
What is the tax code?	
What is the pension deduction?	
What are the total deductions?	

## Task 2a (AC 2.1)

List **two** sources of regular income that a person might have:

1.....

2.....

## Task 2b (AC 2.2 and 2.3)

Write down the cost of **six** different items that you need to pay for during a typical week.

What is the total money spent on these items each week?

You may use a calculator.

List <b>six</b> outgoings	Cost of each item
Item 1:	£
Item 2:	£
Item 3:	£
Item 4:	£
Item 5:	£
Item 6:	£
Total money spent each week:	£

## Task 2c (AC 2.3)

My total weekly income is: £.....

Calculate the difference between your weekly income and the total cost of these six items.

£ .....

Do you have enough money to cover these outgoings?

Yes / No (circle correct answer)

## Task 3a (AC 3.1)

Which of these examples can lead to a person having debt problems?

Tick the **four** correct examples.

- Taking out a payday loan*
- Saving money*
- Not paying your credit card bill*
- Spending more than you earn*
- Only buying what you can afford*
- Gambling your rent money*

## Task 3b (AC 3.2)

State **one** problem that debt can cause for the family.

.....

.....

State **one** problem that debt can cause for an individual.

.....

.....

## Task 3c (AC 3.3)

Identify **two** sources of help for people in debt.

Source 1.....

Source 2.....

END OF EVIDENCE BOOKLET



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**The Qualification Numbers (QN) for these qualifications are:**

OCR Award in Employability Skills Entry Level 3 – 601/5339/8

OCR Award in Employability Skills Level 1 – 601/5341/6

OCR Award in Employability Skills Level 2 – 601/5343/X

OCR Certificate in Employability Skills Entry Level 3 – 601/5340/4

OCR Certificate in Employability Skills Level 1 – 601/5342/8

OCR Certificate in Employability Skills Level 2 – 601/5344/1

**The Unit Reference Number for this unit is:**

Unit 15: Learn about managing money Y/506/8968.

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