

Unit Title: Technical advice and guidance

OCR unit number: 25
 Unit reference number: F/601/3506
 Level: 2
 Credit value: 9
 Guided learning hours: 50

Evidence for this unit can only be achieved through actual work in a work environment. Simulation is not permissible for any competence based unit.

Unit aim

This unit covers basic knowledge of how to provide technical advice and guidance and practical application of this knowledge in providing reactive advice and guidance.

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
<p>The Learner will:</p> <p>1 Know how to provide technical advice and guidance</p>	<p>The Learner can:</p> <p>1.1 Identify how technical advice and guidance can be used</p> <p>1.2 List the types of information which can form the basis of technical advice and guidance</p> <p>1.3 Identify organisational procedures which can apply to the provision of technical advice and guidance</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>	<ul style="list-style-type: none"> • why advice and guidance is required and who the end users are • the different methods used for providing information within an organisation. This may include written and/or verbal, direct and/or indirect methods. They should know when and why different methods are used • advances in technology which can result in improvements to the function and capacity of existing systems • how to identify what technical information they will require in order to deliver effective advice and guidance • where technical information can be obtained and ensure that it is appropriate to needs

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
		<ul style="list-style-type: none"> • how to ensure that the content is suitable with respect to content, accuracy and currency • what the organisational policies are and whether the content would be acceptable
<p>2 Provide reactive technical advice and guidance to customers on a range of topics</p>	<p>2.1 Identify the purposes for which technical advice and guidance is required</p> <p>2.2 Check that customers are entitled to receive the requested technical advice and guidance</p> <p>2.3 Communicate effectively with customers to obtain specified information to enable correct technical advice and guidance to be provided</p> <p>2.4 Interpret given 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 given format and style, 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 provided or does not resolve the request</p>	<ul style="list-style-type: none"> • the different ways they can respond to requests for information when it is not immediately available • the limits of their responsibility and when they need to escalate the requests and who they would refer them to and why • the importance of establishing the needs of the customer and any constraints that may apply • how to identify and obtain relevant information from a variety of sources and ensure that it is fit for purpose • how to communicate effectively with the customer using an approved format • who to refer the information to and how to record the information to create an audit trail ensuring that it is current at the date of the communication • the importance of checking that the information is sufficient to meet the needs of the customer and who to escalate the request to if sufficient information cannot be supplied • how to prepare customer documentation that will comply with recognised quality standards

Learning Outcomes	Assessment Criteria	Knowledge, understanding and skills
		<ul style="list-style-type: none"> • the importance of informing customers of progress • the various constraints that can apply when providing technical advice and guidance and how to address them when meeting the needs of customer requests • organisational policies for providing information and why they need to be followed • how to use a logical, systematic approach to identify the root cause of faults, eg gap analysis, cause and effect, flow charts • how to prevent reoccurrence of the faults identified • the different methods used for diagnosing problems e.g. use of devices, software and/or equipment

Assessment

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 i.e. the purpose of the work etc.

In addition to the recognition of other qualifications, candidates may claim accreditation of prior achievement for any of the elements assessment criteria or complete units of competence, as long as the evidence fully meets the criteria and the candidate can prove that it is all their own work. It is important also that assessors are convinced that the competence claimed is still current. If the assessors have some doubts, they should take steps to assess the candidate's competence directly. An initial assessment of candidates is recommended.

All the learning outcomes and assessment criteria must be clearly evidenced in the submitted work, which is externally moderated by OCR.

Results will be Pass or Fail.

Guidance on assessment

Evidence can reflect how the candidate carried out the process or it can be the product of a candidate's work or a product relating to the candidate's competence.

For example: The process that the candidate carries out could be recorded in a detailed personal statement or witness testimony. It is the assessor's responsibility to make sure that the evidence a candidate submits for assessment meets the requirements of the unit.

Questioning the candidate is normally an ongoing part of the assessment process, and is necessary to:

- test a candidate's knowledge of facts and procedures
- check if a candidate understands principles and theories *and*
- collect information on the type and purpose of the processes a candidate has gone through
- candidate responses must be recorded

It is difficult to give a detailed answer to how much evidence is required as it depends on the type of evidence collected and the judgement of assessors. The main principles, however, are as follows: for a candidate to be judged competent in a unit, the evidence presented must satisfy:

- all the items listed, in the section 'Learning Outcomes'
- all the areas in the section 'Assessment Criteria'

The quality and breadth of evidence provided should determine whether an assessor is confident that a candidate is competent or not. Assessors must be convinced that candidates working on their own can work independently to the required standard.

Additional information

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