

Examples of completed assessment records

(Check with your organisation as to the documents they require you to use. A year should be added to all dates.)

Initial and diagnostic assessment		
Separate tests in English, maths and ICT could also be taken		
Learner: Marcia Indira		Date: 6 August
(Continue overleaf if necessary when answering questions)		
Why have you decided to take this programme/qualification?	I would like to learn more about business administration and finance in particular. I enjoy working in an office and one day I would like to have my own business. For now, I would like to become qualified to enable me to obtain a full time position.	
What experience do you have in the subject area?	I use a computer, deal with telephone calls from clients and staff, cover reception occasionally and manage the accounts for the department.	
What relevant qualifications do you have (if applicable)?	Word Processing and Spreadsheet units at level two.	
Have you completed a learning preference questionnaire? If YES, what is your preferred style of learning? If NO, please complete the questionnaire at www.vark-learn.com and note your results here.	YES/NO V: 3 A: 4 R: 4 K: 9	
Do you have any particular learning needs or requirements we should be aware of? If YES, please state here, or talk to your assessor in confidence.	YES/NO I am a diabetic and I need to take insulin in private when necessary.	
What help would you like with written/spoken English?	None.	Skills test results: English: Not yet taken.
What help would you like with maths?	Some, I would like to take a qualification which will help with accounting.	Skills test results: maths: Not yet taken.
What help would you like with digital skills?	None that I am aware of at the moment.	Skills test results: ICT: Not yet taken.
What help would you like with study skills and academic writing (if applicable)?	I am not used to writing in an academic way therefore I would like some help with how to reference correctly, if this is part of the qualification.	

Action Plan

Action plan			
Learner: <i>Marcia Indira</i>		Assessor: <i>Abbi Cross</i>	
Qualification/unit: <i>Business, Administration and Finance Unit 1</i>		Date: <i>5 September</i>	
Criteria	Action required	Target date	Achievement date
<i>Unit 1:</i>	<i>Marcia is aiming towards the Level 2 qualification. She will attend training one day per week. Separate action plans will be completed as she progresses through the qualification.</i>		
<i>Business Enterprise</i>			
<i>Learning outcome 2:</i>	<i>Q1 Generate a range of ideas for a business enterprise</i>	<i>7 October</i>	
<i>Be able to develop a business enterprise idea</i>	<i>Q2 Compare the viability of the business enterprise ideas</i>	<i>14 October</i>	
	<i>Q3 Select and develop a business idea</i>	<i>21 October</i>	

Assessment plan

Assessment plan	
Learner: <i>Irene Jones</i> Assessor: <i>Jenny Smith</i>	
Qualification/unit: <i>Level 1 Certificate in Hospitality & Catering</i> Date: <i>January 12</i> <i>Unit 101 Maintenance of a safe, hygienic and secure working environment</i>	
Aspects to be assessed	Assessment details
Unit 101.3 <i>Be able to help maintain a hygienic, safe and secure workplace</i>	An observation will take place on February 6th at the County Leisure Centre to assess competence in the work environment towards unit 101.3. The awarding organisation's observation form will be used for this purpose. A witness testimony will be obtained from Irene's supervisor. If any other aspects are seen during the observation which meet the criteria of other units, these will be taken into account.
Unit 101.4 <i>Know how to maintain a hygienic, safe and secure workplace</i>	Oral questions and a professional discussion will take place to assess unit 101.4.

Feedback and action record

Feedback and action record			
Learner: Irene Jones		Assessor: Jenny Smith	
Qualification/unit: Level 1 Certificate in Hospitality & Catering Unit 101		Date: 6 February	
Aspects assessed	Feedback	Action required	Target date
101.3	<i>I observed Irene on 6 February at the County Leisure Centre to assess her competence in the workplace. I used the awarding organisation's documents to ensure all the requirements were met. I added additional comments to these regarding what I saw on the day. Irene successfully performed all the requirements of unit 101.3 and I am pleased to inform her she has passed. Irene obtained a witness testimony from her supervisor, which confirmed she had successfully covered the same criteria over a period of time.</i>	<i>Irene and I will meet on 6 April to complete an assessment plan for unit 102 and to review her progress to date.</i> <i>In the meantime, Irene will read the supporting handouts for unit 102 and put theory into practice at the Leisure Centre.</i>	6 April
101.4	<i>I asked oral questions to check Irene's knowledge and I have digitally recorded her responses as evidence of achievement. I held a discussion with Irene based on the knowledge requirements, which was also recorded. This has been saved on the hard drive under Irene's name and today's date. All the questions were answered correctly and met the requirements of 101.4.</i>		
Achievements	Learning outcomes	Assessment criteria	
Unit 101	3. Be able to help maintain a hygienic, safe and secure workplace. 4. Know how to maintain a hygienic, safe and secure workplace. (Learning outcomes 1 and 2 have previously been achieved)	3.1 - 3.5 4.1 – 4.19	

Assessment tracking sheet

Assessor: <i>Jenny Smith</i>	Qualification: <i>Level 1 Certificate in Hospitality & Catering</i>				
Learner name (registration number if applicable):	Aspects/units assessed:				
	101	102	103	104	105
<i>Chang Hanadi</i> <i>4524UDBQ</i>	<i>11 June</i> <i>Pass</i>		<i>08 March</i> <i>Pass</i>	<i>10 May</i> <i>Refer</i> <i>15 May</i> <i>Pass</i>	
<i>Hamed Aamir</i> <i>1674UEME</i>		<i>07 May</i> <i>Pass</i>			
<i>Jones Irene</i> <i>1234ABCD</i>	<i>06 February</i> <i>Pass</i>				
<i>Wilson Peter</i> <i>7985IENF</i>	<i>15 January</i> <i>Pass</i>	<i>04 February</i> <i>Pass</i>			
<i>Young Lou</i> <i>7496UWME</i>	<i>10 January</i> <i>Pass</i>				