## 242820 Workplace Project

1. Organisational documents

1.1 Include **three completed organisational documents** (reports, data sheets, memos, etc.) that you have to submit to management in the course of your duties.

1.2 They must all be different types and must be **signed by the recipient(s)/ your coach.**

1.3 Write a short paragraph of 3-5 lines on each document, describing the **purpose** of each and **where it ultimately ends up**.

1.4 Explain how you ensure that documents and records in your care are safely stored. **What storage method do you use and how safe is it?**

**2. Individual records**

2.1 Include **2 copies of actual employee records:**

2.1.1 One must be a **record of a meeting** with an employee about his/her performance (This can range from a formal performance appraisal to an informal discussion where you praise or reprimand an employee, e.g. you can submit a signed and dated transcript of the “sandwich” you gave him/ her)

2.1.2 One must be a **record of attendance** (e.g. time sheet, leave application, etc.) 2.2 Select one piece of information from each and explain why it is important that you, as the team leader, have access to that specific information.

2.3 Give examples of what would constitute misuse of that information by either you or the company.

**3. Disciplinary records**

3.1 Include a copy of a **record of a disciplinary meeting** you either chaired or attended. (3.2 Based on the evidence presented at this meeting, express an opinion (in a paragraph of 3-5 lines) as to **what corrective action should be taken**.

**4. Control**

4.1 Include copies of the following records for a period of **one month** (1 copy of each is sufficient):

4.1.1 Budget sheets

4.1.2 Order forms/ requisitions

4.1.3 Stock control

4.2 Write a paragraph of 5-10 lines OR draw up a table, explaining how each of these documents is important when it comes to **controlling a team’s costs and cost-cutting in a team (See US 13918)**

**5. Records of accidents, injuries and other incidents:**

5.1 Include **a copy** of **either** an accident, or an injury, or an incident report.

5.2 Write a short explanation (3-5 lines) of **why** records of accidents, injuries and other incidents must be kept by a company.

5.3 Explain the **consequences** if the company did not comply with these requirements.

5.4 Give an example from your own or a colleague’s experience where a record was **not kept** according to the requirements. What was missing from the records and what was the outcome of the matter? What lesson can one learn from this incident?

Please copy and complete a cover sheet for **each** Summative Assessment:

****Unit Standard Title: 242820****

**Identify and keep records that a team manager is responsible for keeping**

**Summative Assessment Title:**

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**Company: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Work address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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**Date completed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

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