

**LEVEL 4 DIPLOMA**  
**QUALIFICATION HANDBOOK**  
**CAREER**  
**INFORMATION**  
**AND ADVICE**

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**603/7560/7**  
**04663**

## Key updates to this handbook

Section	Title of section and change	Version and date issued
All	Hyperlinks updated	Version 3 February 2024
8	8.3 Collecting evidence of learner performance to ensure resilience in the qualifications system – new section	
1	Introductory paragraphs – content updated 1.2 Entry requirement – content updated 1.3 Funding – content updated 1.4 Qualification size – content updated	Version 2 January 2022
2	Qualification summary table – content updated	
4	4.1 Assessment centre requirements – content updated	
5	5.3 Planning assessment – content updated 5.6 Methods of assessment – content updated 5.8 Making assessment decisions – content updated 5.13 Observation – content updated 5.14 Questioning – content updated 5.15 Professional discussion – content updated 5.17 Witness statements – content updated 5.21 Quality assurance – how it works – new section title and content updated 5.22 Direct Claim Status (DCS) – content updated	
6	Section title updated 6.1 OCR assessment material – new section title 6.2 Our professional development programme – new section title and content updated 6.3 Useful documents and links – content updated	
8	8.3 Mode of delivery – content updated	
9	9.1 Feedback and enquires – content updated	
	First issue.	Version 1 September 2021

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# 1 Introduction

OCR entry code	Title	Qualification Number
04663	OCR Level 4 Diploma in Career Information and Advice	603/7560/7

The information provided in this handbook is correct at the time of production. Occasionally we may update it so please check the qualification [webpage](#) for the most up-to-date information.

This handbook contains what you need to know about the planning, delivery and assessment of this qualification. Staff involved in the delivery of this qualification must have access to and understand the requirements in this handbook.

Information about the administration of this qualification is available on our [website](#).

You will find all the details about how the qualification run, what you need to do and when. It covers everything from becoming an OCR centre, to making entries, claiming certificates, special arrangements and contacting us for advice.

You should make sure learners are informed of the title and level of the qualification they have been entered for and that Oxford Cambridge and RSA Examinations (OCR) is the awarding organisation for their chosen qualification.

## 1.1 Why choose OCR Level 4 Diploma in Career Information and Advice?

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The OCR Level 4 Diploma in Career Information and Advice provides learners with a high quality, nationally recognised qualification. It is a vocationally-related, credit-based qualification that relates to national occupational standards (NOS) and provides valuable opportunities for individuals to develop skills, gain underpinning knowledge and understanding and demonstrate competence in the workplace or provide continued professional development.

The qualification has a core of mandatory units which will be applicable to all staff, and a wide range of optional units to allow specialisation as appropriate.

This aim of this qualification is to:

- provide regulated professional development opportunities for those currently working within the career development sector in para-professional roles
- prepare learners for employment in a career development role
- improve the essential knowledge, understanding and skills required for employment in a career development role, whilst employed
- update the knowledge skills and understanding of those already employed in a career development role to improve their performance
- form a progression route to the OCR Level 6 Diploma in Career Guidance and Development or other appropriate higher education qualifications.

## 1.2 Entry requirement

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There are no formal entry requirements for this qualification. We recommend that an initial assessment should take place to make sure the learner is capable of reaching the required standards.

This qualification is regulated for learners aged 18 years and over.

This qualification is available to anyone who is capable of reaching the required standards and meeting the assessment criteria for the units though the particular setting in which they practice. It has been developed free from any barriers that restrict access or progression thereby promoting equal opportunities.

All staff involved in the assessment or delivery of this qualification should understand the requirements of the qualification and match them to the needs and capabilities of individual learners before entering them for this qualification.

## 1.3 Funding

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Some qualifications may be eligible for a loan. For more information about Advanced learner loans see the [Education and Skills Funding Agency](#).

You should use the Qualification Number (QN) when looking for public funding for learners. If you have any queries about funding for this qualification, email us at [funding@ocr.org.uk](mailto:funding@ocr.org.uk).

## 1.4 Qualification size

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The size of the qualification is described in terms of Guided Learning Hours (GLH) and Total Qualification Time (TQT).

GLH indicates the approximate time (in hours) that the learner will be supervised during any teaching, learning or assessment activities. We have worked with people who are experienced in delivering this qualification to determine what content needs to be taught and how long it will take to deliver.

TQT is comprised of two elements: GLH, and an estimate of the number of hours a learner will reasonably spend on any unsupervised learning or assessment activities (including homework) so they can successfully achieve their qualification.

OCR Level 4 Diploma in Career Information and Advice requires a minimum 280 GLH. Total Qualification Time (TQT) is 450 hours.

## 1.5 Progression opportunities

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This qualification has been designed to encourage progression to the OCR Level 6 Diploma in Career Guidance and Development. It may also be used as part of continuous professional development for those currently working in the career development sector.

## 2 Qualification summary

### OCR Level 4 Diploma in Career Information and Advice

<b>OCR entry code</b>	04663	<b>Qualification Number</b>		603/7560/7
<b>Approved age group</b>	Pre-16	16-18	18+	19+
			✓	✓
<b>This qualification is suitable for learners</b>	<ul style="list-style-type: none"> <li>Studying in preparation for employment in the career development sector.</li> <li>Employed in the career development sector who are wishing to undertake professional development.</li> <li>Wishing to gain a Level 4 qualification to support further study in Further Education (FE) and Higher Education (HE) in the career development sector.</li> </ul>			
<b>Entry requirements</b>	There are no formal entry requirements for this qualification.			
<b>Total Qualification Time (TQT)</b>	450	<b>Guided Learning Hours</b>	280	
<b>Credit requirement</b>	Minimum credit is 45 credits 30 credits from 5 mandatory units and 15 credits from 18 optional units			
<b>Structure and options</b>	5 mandatory units			30 credits
	Minimum credits from optional units in Group B			15 credits
<b>Assessment model</b>	This qualification is pass/fail. This qualification is internally assessed by your assessors and quality assurance personnel (e.g. teachers, assessors) and externally verified by OCR.			
<b>Last date to enter learners</b>	This is the operational end date for the qualification. We will notify you at least six months before the qualification closes for entries and this information will be available on Ofqual's register of accredited qualifications and our <a href="#">last entry/certification notification</a> .			

# 3 Structure and content

## 3.1 Qualification structure and rule of combination

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The Rule of Combination (ROC) specifies how units can be combined and the overall number of credits to be achieved for the qualification to be awarded.

The qualification has been designed with the first five mandatory units in a logical progressive order. Learners do not have to achieve these units in any particular order, but it is strongly advised that they are studied in sequence where possible, especially for those who are new to their role. Learning programmes should be tailored to meet individual needs. It is recommended that, wherever possible, you deliver this qualification holistically by identifying opportunities to link the units and levels.

When combining units for this qualification, it is your responsibility to make sure the rule of combination is followed.

The units are available to download from our qualification [webpage](#).

## OCR Level 4 Diploma in Career Information and Advice

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To achieve this qualification, learners must achieve a total of 45 credits made up as follows:

- 30 credits from the 5 mandatory units in Group A
- a minimum of 15 credits from the optional units in Group B.

The following tables contain the groups of mandatory and optional units.

### Group A Mandatory units

OCR Unit No	Unit title	Unit Reference No (URN)	Credit value	Level	GLH
1	Preparing to work in the career development sector	F/618/7253	6	4	40
2	Reflecting on practice and continuous professional development	J/618/7254	6	4	40
3	Interact with clients to determine their need for career guidance and development	L/618/7255	6	4	40
4	Meeting the career-related information needs of clients	R/618/7256	6	4	40
5	Career choice theories and concepts to support clients	Y/618/7257	6	4	20



## Group B Optional units

OCR Unit No	Unit title	Unit Reference No (URN)	Credit value	Level	GLH
6	Plan and deliver career-related learning in groups	D/618/7258	6	4	40
7	Assist clients to review the achievement of career-related actions	H/618/7259	3	4	20
8	Explore and agree how to meet the career-related needs of clients	Y/618/7260	6	4	40
9	Source, evaluate and use Labour Market Information (LMI) with clients	D/618/7261	3	4	20
10	Understand how to support specific client groups to overcome barriers to learning, training and work	H/618/7262	6	6	40
11	Engage with other relevant people to help clients to meet their career development needs	K/618/7263	3	4	20
12	Assist clients to apply for learning, training and work	M/618/7264	3	4	20
13	Provide on-going support to clients	T/618/7265	3	4	20
14	Promote career-related learning to clients	A/618/7266	6	4	40
15	Negotiate on behalf of clients	F/618/7267	6	5	40
16	Obtain and organise career-related information to support clients	J/618/7268	3	4	20
17	Refer clients to sources of support to meet their needs	L/618/7269	3	4	20
18	Prepare to deliver services to clients in an outreach setting	F/618/7270	3	4	20
19	Operate within networks to support the delivery of the service	J/618/7271	3	4	20
20	Manage a personal caseload/work responsibilities in the career development sector	L/618/7272	4	4	20
21	Enable clients to develop and evidence their employment-related skills	R/618/7273	6	6	40
22	Use digital technology in the career development sector	Y/618/7274	6	6	40
23	Plan, deliver and evaluate presentations	D/618/7275	6	4	40

# 4 Centre assessor and quality assurance personnel requirements

This section provides information on centre assessor and quality assurance personnel requirements for verified qualifications.

## 4.1 Assessment centre requirements

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The occupational knowledge and expertise of those undertaking the roles of assessment and internal quality assurance is one of the key factors underpinning valid, fair and reliable assessment. The integrity of assessments and quality assurance is of paramount importance.

Your centre must:

- make sure there are sufficient trained or qualified personnel to assess the number of expected learners
- make sure there are sufficient trained or qualified personnel to internally quality assure for the number of learners and assessors (i.e. you must have at least one assessor and one Internal Quality Assurer (IQA) to run this qualification)
- put systems and internal quality assurance personnel in place to make sure that all assessments are valid, reliable, safe and manageable and suitable to the needs of the learner
- make sure evidence is authentic and sufficient
- make sure there is a standardisation process in place to make sure that all assessments are consistent and fair
- make sure those undertaking the roles of quality assurance and assessment maintain their skills, knowledge and understanding about assessment and quality assurance and the associated qualification
- make sure there is sufficient time to conduct effective assessment and internal quality assurance
- make sure any corrective measures, identified by OCR External Quality Assurers (EQAs) and OCR, are addressed.

The occupational expertise of those undertaking the roles of assessment and internal quality assurance is one of the key factors underpinning valid, fair and reliable assessment. The integrity of assessments and quality assurances is of paramount importance. Centres must ensure that there is sufficient time to conduct effective assessment and internal quality assurance.

- Assessment decisions for criteria that must be assessed in the workplace, as identified in unit assessment requirements, must be made in a real work environment by an occupationally competent assessor.
- Assessment decisions for criteria that must be assessed in the workplace (competence based assessment criteria) must be made by an assessor with the expertise to make assessment decisions.

- Competence based assessment must include direct observation as the main source of evidence.
- Simulation may only be utilised as an assessment method for competence based assessment criteria where this is specified in the assessment requirements of the unit.
- Expert witnesses can be used for direct observation where:
  - they have occupational expertise for specialist areas, or
  - the observation is of a particularly sensitive nature.

The use of expert witnesses should be determined and agreed by the assessor.

- Assessment of criteria not identified in the unit assessment requirements as requiring assessment in the workplace may take place in or outside of a real work environment.
- Assessment decisions for knowledge based assessment criteria must be made by an occupationally knowledgeable assessor.
- Assessment decisions for knowledge based assessment criteria must be made by an assessor qualified to make assessment decisions. Where assessment is electronic or undertaken according to a set grid, the assessment decisions are made by the person who has set the answers.

## 4.2 Centre assessor responsibilities

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Assessment is an activity carried out by an individual either as a specific role or as part of a wider role, for example teacher, tutor, supervisor, manager. All centre assessors must have the role of assessor identified in their role profile.

All assessors must:

- have relevant current industry experience and competence in the occupational working area at, or above, the level being assessed. This may be evidenced through CV and references, possession of a relevant Careers or Advice and Guidance qualification, appropriate membership of a relevant professional body or Continuing Professional Development (CPD)
- have a sound understanding of the National Occupational Standards for their subject area
- hold, or be working towards, an appropriate assessor qualification (e.g. A1, CAVA, D32/33, TAQA). For those working towards an appropriate assessor qualification, it will need to be achieved within twelve months of the starting date and all decisions must be countersigned by a qualified assessor
- have direct or related relevant experience in assessment
- be committed to further training and development.

## 4.3 Assessment and the Data Protection Act

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Centre assessors, who are responsible for assessing learners' evidence for internally assessed units, must make sure that learners know they must comply with the Data Protection Act 2018 and the UK General Data Protection Regulation (UK GDPR) when they are producing work for assessment. Learners must not reference another individual's personal details in any evidence produced for assessment. It is the learner's responsibility to make sure evidence that includes another individual's personal details is anonymised.

## 4.4 Internal Quality Assurance Personnel (IQA)

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Internal quality assurance is an activity that can be performed by a dedicated individual or as part of an individual's wider role.

All Internal Quality Assurers (IQAs) must:

- be qualified as an Internal Quality Assurer (IQA) (either V1, D34 or Award in the Internal Quality Assurance of Assessment Processes and Practice)
- be occupationally knowledgeable across the range of units for which they are responsible prior to commencing the role. IQAs must also sample the assessment process and resolve differences and conflicts on assessment decisions
- ensure that assessment has been carried out by persons who are occupationally competent within the area they are assessing
- maintain their occupational knowledge by actively engaging in continuous professional development activities in order to keep up-to-date with developments within the sector.

For the purpose of Internal standardisation, a member of staff needs to be nominated to take responsibility for this process.

The role of the IQA is to:

- make sure all centre assessors are assessing to the required standard
- make sure that all assessment decisions are fair, valid and reliable
- make sure feedback is given to all centre assessors and documented e.g. records of feedback
- suggest ways in which assessment may be brought into line to meet the required standards
- check that all units have been included in internal standardisation
- organise regular standardisation meetings / activities / events for the centre assessors
- provide feedback to centre assessors and identify development needs.

# 5 Verified assessment

This section provides guidance on verified assessment: how to plan and manage assessment and what controls must be applied throughout the process. Your centre must comply with [OCR's criteria for verified qualifications](#). Non-compliance with the OCR Criteria will result in sanctions and actions which your External Quality Assurer (EQA) will discuss with you at your visit and document on the EQA report.

## 5.1 Overview of the assessment

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This qualification is internally assessed by centre assessors and quality assured by internal quality assurance personnel and externally verified by OCR.

### Teaching and Learning

Where teaching content is contained within the unit, it is not exhaustive and may be expanded or tailored to particular contexts in which the unit is being taught and the assessment criteria applied.

We recommend that teaching and development of subject content and associated skills be referenced to real-life situations, using appropriate work-based contact and vocationally experienced delivery personnel.

### Evidence

When you are satisfied that your learner has met all of the requirements for a unit, you must sign an evidence record sheet to confirm the assessment process is complete.

## 5.2 Initial assessment of learners

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It is important that you carry out an initial assessment to identify learners' level of competence, knowledge and understanding and any potential gaps that need to be addressed.

This will also:

- help you and the learners identify the most appropriate optional units
- allow you to plan the assessment
- help learners to understand the best place to start generating evidence.

## 5.3 Planning assessment

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Centre assessors must take responsibility for planning assessment with learners. This will involve discussing details with learners including:

- agreeing the best source of evidence to use for particular units
- deciding the best way of assessing the learner
- confirming the best times, dates and places for the assessments to take place
- agreeing a flexible timetable for unit completion and assessment.

Guidance is given on each unit regarding the recommended forms of assessment which are most appropriate for that unit. Utilising a wide range of evidence formats across units should help to ensure the learner's overall portfolio is robust.

Centre assessors must complete a record of their assessment planning and regularly give feedback to learners.

## 5.4 Real work

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Real work is 'where the learner is engaged in activities that contribute to the aims of the organisation by whom they are employed' for example in paid employment or working in a voluntary capacity or work placement.

Where the learner's performance is assessed within the workplace, this evidence should naturally occur within the learner's work role. This will include the learner's application of knowledge. This principle will apply to competence units, except where simulation is acceptable (see simulation).

Workplace evidence may be gathered in full, part-time, casual or voluntary employment or a 'work placement' e.g. fulltime learners placed into a working environment for a day per week).

Supporting evidence for any work experience from a supervisor or manager must add to the assessment process.

## 5.5 Simulation

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Simulation is not allowed. However, where access to assessment is jeopardised by this, guidance should be sought from OCR who will decide on the issue.

## 5.6 Methods of assessment

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We have identified the main assessment methods suitable for this qualification:

- [observation of practice by the assessor or expert witness for occupational specific units](#)
- [questioning the learner or witness by the assessor](#)
- [professional discussion](#)
- [examining work products – e.g. reports, presentations](#)
- [examining written or typed evidence](#)
- [examining evidence from others through a witness statement](#)
- reflective case studies
- [personal statement](#).

It is your responsibility to agree the best method of assessing a learner in relation to their individual circumstances.

The methods agreed must be:

- valid
- reliable
- safe and manageable
- suitable for the learner.

### Valid

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A valid assessment method is capable of measuring the knowledge or skills in question. For example, a written test cannot measure a learner's practical skills or their ability to work well with others.

Validity can be compromised if a learner does not understand what is required of them. For example, a valid method of assessing a learner's knowledge and understanding is to question them. If the questions posed are difficult for the learner to understand (not in terms of the content but the way they are phrased, for example), the validity of the assessment method is questionable.

As well as assessment methods being valid, the evidence presented must also be valid. For example it would not be appropriate for the learner to present the organisation's staff handbook to demonstrate Unit 1 Learning outcome 4, regarding legislation and codes of practice. It would be more appropriate for the learner and assessor to discuss what legislation and codes of practice apply to the organisation and how the learner knows that he/she is working in accordance with these.

### Reliable

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A reliable method of assessment produces consistent results across different centre assessors on each assessment occasion. Internal Quality Assurers (IQAs) must make sure that all assessors' decisions are consistent.

## Safe and manageable

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Assessors and Internal Quality Assurers (IQAs) must make sure that the assessment methods are safe and manageable and do not put unnecessary demands on the learner and/or the organisation they work for.

## Suitable to the needs of the learner

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OCR has tried to make sure that achievement of this qualification is free from constraints outside the requirements of the learner's job role.

For learners who have access requirements please see [section 8.7 Accessibility](#).

If centre staff think that any aspect of this qualification unfairly restricts access and progression, they should talk to their OCR EQA about this.

## 5.7 Authentication

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Assessors must be confident that the work they assess is the learner's own. This does not mean that a learner must be supervised throughout the completion of all work, but the assessor must exercise sufficient supervision, or introduce sufficient checks, to be in a position to judge the authenticity of the learner's work.

Wherever possible, the assessor should discuss work-in-progress with learners. This will not only make sure that work is underway in a planned and timely manner but will also provide opportunities for assessors to check authenticity of the work and provide general feedback.

Where permitted by the units, the work of individual learners may be informed by working with others, for example, in undertaking research, but learners must provide an individual response as part of any task outcome.

## Plagiarism

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Learners must not plagiarise. Plagiarism is the submission of another's work as one's own and/or failure to acknowledge the source correctly. Plagiarism is considered to be malpractice and work submitted for external verification where plagiarism is suspected will be reported to OCR and investigated. The outcome of the investigation may involve sanctions/penalties imposed on learners, staff and/or the centre.

Plagiarism sometimes occurs innocently when learners are unaware of the need to reference or acknowledge their sources. It is therefore important that centres make sure that learners understand that work they submit must be their own and that they understand the meaning of plagiarism and what penalties may be applied. Learners may refer to research, quotations or evidence but they must list their sources.

If learner work has been copied from a published or electronic source, and has been referenced, this can still be classed as plagiarism. Where the copied work cannot be considered to be his/her own independent work and/or does not demonstrate the learner's own practice, understanding and knowledge of the subject.

The JCQ [Plagiarism in Assessments Guidance for Teachers/Assessors](#) provides further information.



## Resubmitting work for assessment

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While there are no restrictions on the number of times that a learner can resubmit evidence, it is the responsibility of the assessor to make sure that the details of any feedback and guidance are clearly recorded.

Resubmission at the centre assessment stage is intended to allow the learner to reflect on feedback and improve, but not to be an iterative process where they make small modifications through ongoing feedback to eventually achieve the desired level.

**Please note:** Your centre must confirm to us that the evidence produced by learners is authentic. The Evidence Record Sheet includes a declaration for learners to sign and is available from the [webpage](#).

## 5.8 Making assessment decisions

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Learners are not required to meet all the criteria every time they carry out an activity, but **it is necessary that all learners produce their own evidence to meet all assessment criteria.**

Learners must consistently provide sufficient evidence for you to be able to confirm that they are competent in their working environment.

Centre assessors should:

- plan with the learners
- assess learner performance, knowledge and understanding
- look at the evidence
- question and give feedback to the learner working towards this qualification.

Centre assessors should also be satisfied that the learner has demonstrated competence when meeting the assessment criteria.

All criteria must be completed before the assessor can sign the unit off as complete.

## 5.9 Generation and collection of evidence

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Learners' evidence should be in an appropriate format to demonstrate the skills, competency, or application of knowledge and understanding, as specified in each assessment criterion within the unit in question.

Evidence can take many forms, for example, written work, audio/visual recordings, digitally formatted documents, a product or photographs (of a product).

If group work is used as evidence, the learner's contribution must be clearly identified.

Evidence can come from a number of sources. A list of the main sources of evidence is provided below:

- [observation](#)
- [questioning](#)
- [professional discussion](#)
- [work products](#) – the outcome or product of a learner's work activity
- [witness testimonies](#)
- [personal statement](#)
- [assignments, tasks, projects or tests](#) – centre devised projects e.g. a case study.

Learners should take responsibility for the development of their own paper portfolios if used, with appropriate support from assessors, employers and peers. They should be aware of the need for clear presentation and ordering as an aid to assessment and referencing once the work is submitted.

Where evidence is relevant to more than one assessment criterion in one or more units, the learner should cross-reference the evidence within their unit portfolio so that it can be considered by you as centre assessor and by the OCR EQA if required.

Evidence record sheets are available to download from our website. Learners can use these sheets to record their evidence and link it to the assessment criteria in one unit. You **must** use this sheet or your own suitable alternative to allow the OCR EQA to see which assessment criterion each piece of evidence refers to.

E-portfolio systems, if used instead of paper portfolios, will generate evidence referencing and scoring.

Learners must not reference another individual's personal details in any evidence produced for summative assessment. It is the learner's responsibility to make sure evidence that includes another individual's personal details is anonymised to comply with the Data Protection Act 2018 and the UK General Data Protection Regulation (UK GDPR).

## 5.10 Type of evidence

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Evidence can take many forms, for example, written work, audio/visual recordings, digitally formatted documents, a product or photographs (of a product).

## 5.11 Amount of evidence needed

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It is difficult to give detailed guidance about the amount of evidence needed as it depends on the type of evidence collected and the judgement of assessors.

For a learner to be judged competent in a unit, the evidence presented must satisfy all the assessment requirements and assessment criteria.

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

## 5.12 Assessment of the evidence

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It is the assessor's responsibility to:

- assess the evidence presented by the learner
- provide feedback to the learner
- make an assessment decision which will be confirmed through internal and external quality assurance.

Assessors will judge learners' evidence against the assessment criteria specified in the unit.

## 5.13 Observation

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Only approved and qualified assessors (see [section 4 Centre assessor and quality assurance personnel requirements](#)) may carry out observations for the assessment of this qualification.

The assessor and learner should plan observations together, but it is the assessor's responsibility to record the observation properly.

After the observation has taken place, the assessor needs to record an assessment decision and the justification for the decision. The assessor should also give feedback to the learner.

Whilst observation is not necessarily appropriate or required for every unit, some observation of the learner's performance is mandatory across the qualification. Where observation may create a barrier for a specific learner, individual cases should be referred to OCR.

## 5.14 Questioning

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Only approved and qualified assessors (see [section 4 Centre assessor and quality assurance personnel requirements](#)) may question a learner or witness for the assessment of this qualification.

Questioning the learner is usually an on-going part of the assessment process, and it is necessary to:

- test a learner's knowledge of facts and procedures
- check if a learner understands principles and theories *and*
- collect information on the type and purpose of the activities a learner has been involved in.

Assessors should ask open questions; that is questions where the learner has to give a full answer, not simply 'yes' or 'no'. Assessors should also be careful to avoid complicated questions which may confuse the learner.

It is important that assessors record assessment decisions after they have questioned the learner. They must record enough information to justify the decisions they make. This does not mean that assessors must record, word for word, the questions put to the learner and the answers the learner gives. However, assessors must record enough information about what they asked and how the learner replied to allow the assessment to be verified.

Questioning witnesses is normally an ongoing part of validating written witness statements. However, questioning witnesses should not just be used for this purpose. Assessors should be able to speak to witnesses and record, in whatever way is suitable, the verbal statements of these witnesses. A record of verbal statement is a form of witness statement and could provide valuable evidence to confirm a learner's competence over a period of time.

## 5.15 Professional discussion

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Professional discussion is a structured, planned and in depth discussion recorded by the assessor. It allows the learner to present evidence of competence and to demonstrate skills, knowledge and understanding through discussing the evidence and showing how it meets the requirements of the qualification. The assessor should guide the discussion by using open questioning, active listening and knowledge of the standards.

## 5.16 Work products

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Work products are produced in the workplace. They should be of naturally occurring practice within the learner's role. The evidence presented for assessment may be the actual product or a record of the product e.g.: business letter, email, plan, spreadsheet.

## 5.17 Witness statements

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Witness testimonies can be used as evidence of a learner's performance. Such testimonies could be made verbally to the assessor or could be written in a short note.

If a witness provides a written statement, they should include the following:

- the learner's name
- the date, time and venue of the activity carried out
- a description of the activities performed by the learner
- the date of writing the testimony
- a description of the witness' relationship to the learner
- their signature and job title
- their contact details (such as telephone number).

It is not appropriate for witness testimonies to contain a list of the skills to which it relates. Witnesses must direct the information in their testimonies to describing what the learner did. The assessor will then judge whether the learner's activities demonstrate competence to the standards. It is not acceptable for learners to produce written witness testimonies for witnesses to sign, to support a qualification they are working towards.

## 5.18 Personal or learner statement

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This is a learner's own account of what they did.

Personal statements can be a:

- written or verbal account of specific incidents, activities or situations
- log or diary
- reflective account.

All personal statements made by learners must be authenticated, as a true account of what took place, by an appropriate witness e.g. assessor, employer, peer.

## 5.19 Assignments, tasks, projects or tests

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For some units it may be appropriate for your centre to devise assignments, tasks, projects or tests. This provides your centre with opportunities to meet the needs of the learner and local employers.

Centres will need to make sure that any assignments, tasks, projects or tests make sure learners to meet all of the assessment criteria in the units.

Your centre is best placed to decide on an appropriate context for the assessment for your learners.

Centres must make sure learners are clear about the tasks they are to undertake and the assessment criteria which they are expected to meet.

## 5.20 Recording evidence

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As well as collecting evidence, learners must record all their assessed evidence using:

- Evidence recording sheets (which show, per unit, the assessment criteria and the evidence which has been collected to meet them)
- Record of achievement (which shows the units the learner has completed, and which have been signed off by the assessor).

The combination of these forms provides the learner's record of what evidence has been accepted as proof of competence and where that evidence can be found, as well as recording progress towards, and achievement of units.

Completing the forms is an ongoing process involving discussion and agreement between the learner and their assessor. The learner should fill in and keep the forms while working towards their qualification, though an assessor may help the learner fill them if necessary.

OCR provides forms specifically designed for this qualification, but centres can design their own recording documents if they prefer. You should talk about any document you want to use with your EQA before you use them. [OCR Administration area - Other vocational qualifications](#) includes information and criteria for designing recording documents.

The OCR forms and recording documents which assessors and learners might want to use for this qualification can be found on the qualification [webpage](#).

E-portfolio systems, if used instead of paper portfolios, will generate evidence referencing and scoring.

## 5.21 Quality assurance – how it works

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### Internal quality assurance

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It is your centre's responsibility to appoint internal quality assurance personnel (See [section 4.4 Internal Quality Assurance Personnel \(IQA\)](#)) to manage the internal quality assurance (IQA) process.

The purpose of internal standardisation is to monitor standards and to ensure consistent and reliable assessment decisions across all staff, ensuring that all assessment requirements of the qualification are met. Internal standardisation provides a system for checking the quality of assessment to make sure that it is, valid, authentic, current, and reliable.

For this qualification you must carry out internal quality assurance to make sure that all learners' evidence is assessed consistently to the required standard.

A nominated member of staff (IQA) at your centre must take responsibility for the process and will:

- advise on interpretation of the standards, including feedback from previous assessments (where relevant)
- provide advice and support to centre assessors (staff who are assessing the qualification)
- monitor and observe assessment practice to ensure that all assessments are in line with the required standards.
- make sure feedback is given to all centre assessors and documented e.g. records of feedback
- maintain quality assurance documentation
- liaise with the allocated EQA.

There are three stages of assessment where internal standardisation plays a vital role: setting of assessments – including devising and/or modifying by centres, production of evidence and expectations and standardising centre staff assessment decisions.

Internal standardisation is an ongoing process and should always include the following formal stages:

- review centre devised / modified assignments, if relevant
- standardise assessment decisions
- sample assessment evidence
- review assessment practices.

[A guide to internal standardisation for vocational qualifications](#) is available on the OCR website.

## External quality assurance

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Once you make learner registrations, we will allocate an EQA who will arrange to visit your centre to verify your assessments and internal quality assurance. OCR will contact you to request information on the learners and assessment staff is sent to the EQA.

EQA visits take place twice a year (roughly 6 months apart) and at the end of each EQA visit a provisional date is agreed for the next visit. Visits take place irrespective of whether certification claims have been made as learners are sampled mid-qualification as well as at the point of certification. When learners have completed units of the qualification and they have been assessed and internally quality assured, claims for the units or full awards can be made via OCR Interchange.

The EQA **must** interview learners, centre assessors and internal quality assurance personnel during their visits.

For each external quality assurance visit your centre must have available and provide access to the OCR EQA:

- the learner assessment records for all learners
- all evidence/portfolios for learners certificated by Direct Claims Status (DCS) since the last EQA visit
- the portfolios for learners the EQA has requested to sample
- assessments taking place for observation, when requested/arranged
- OCR's on-line claim system (Interchange)
- as requested by the EQA, learners, centre assessors and internal quality assurance personnel which may include any claims for certificates through Direct Claims Status (DCS)
- a sample signature list for all centre assessors and internal quality assurance personnel
- details of training, curriculum vitae and original certificates for new members of the assessment team. Authorised copies of original certificates and updated documents for existing assessment team members
- all centre records, see the next section for more details
- evidence of achieving action points and/or recommendations since the last EQA visit,
- if recorded evidence is used, make sure all recordings and appropriate playback equipment is available.

## Centre records required for quality assurance

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Your centre must make sure that internal quality assurance and learner assessment records are available for external quality assurance purposes. These records must be securely held by your centre for a minimum of three years following learner achievement of the qualification (i.e. from the date of certification).

As a minimum these must record the following information:

- the learner's name and location
- the title and level of the qualification they are taking
- the learner's start date on the programme and confirmation of learner entry



- the name of the centre assessor
- the name of the internal quality assurance personnel
- the date and outcome of the initial assessment of the learner
- dates and details of learner reviews and feedback sessions
- assessment method(s) used
- dates of all assessments and their outcomes (that is, the decision whether the learner has met the requirements or not) cross-referenced to the unit
- enough detail of the assessments to justify the decision made
- an indication of the frequency, and reason for, the use of simulation, if used
- dates and outcomes of internal quality assurance
- action resulting from internal quality assurance
- learner's achievement(s).

Records should show formative assessment decisions (ongoing decision making), summative assessment decisions and feedback to the learner.

## OCR External Quality Assurer (EQA) reports for centres

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Our EQA will report against the [OCR criteria for verified qualifications](#). Our EQA will use the report to provide feedback to your centre and to OCR.

All EQA reports are reviewed by OCR and their actions/recommendations are considered. The final decision on the application of sanctions at Level 2 or above lies with OCR.

If your centre is found to be non-compliant with any of the OCR criteria this will result in action(s) and appropriate sanction(s) being recommended. When a sanction is recommended there will always be one or more actions for your centre to address.

If you wish to appeal a sanction or EQA decision then you should follow the link to [OCR Administration area - Post result services](#).

## 5.22 Direct Claim Status (DCS)

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Centres who consistently meet all the required criteria and deliver high quality assessment for an individual qualification over approximately a twelve month period could be awarded DCS. This is when centres can claim certification for identified qualifications in between their EQA visits. Please see the OCR Administration area - Direct claim status for more details.

The decision on whether DCS is awarded, retained, or withdrawn lies with OCR.

In addition to the checks made by the OCR EQA during an EQA visit, OCR (not EQAs) will undertake short notice record reviews of DCS claims. OCR will contact centres and request a copy of their candidates claims record.

### Critical points regarding Direct Claim Status

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- A **candidate claims record** must be completed and maintained for all claims made via DCS. A [template](#) is available for this or centres can create their own record or use an existing report from a management information system. The record must include learner and unit details for any DCS claims made since the centre's last quality assurance visit.
- Centres will keep assessment and internal quality assurance records relating to learners for who direct certification has been claimed for at least three years from the date of the claim. These records will include learner names and registration numbers with details of assessment decisions, internal quality assurance and claims for certification.
- Centres **must** advise OCR immediately of any staffing or resource changes. Where Internal Quality Assurers (IQAs) change, we reserve the right to remove DCS pending the evaluation of a new IQA. Direct Claim Status may be removed at any time if we believe that the above information is no longer current or the assessment and quality assurance at the centre is compromised.
- All portfolios for learners certificate via DCS since the previous quality assurance visit must be available to the EQA on request during the visit. This is in addition to the portfolios pre-selected for sampling by the EQA.
- All learners, including any who leave the centre following certification via DCS, must be asked to retain their portfolios and Cumulative Assessment Records (CARs) in good condition until the next EQA visit **for the qualification** claimed.
- Certificates issued under DCS must be confirmed through a quality assurance visit. If a portfolio is not available for sampling by the OCR EQA when requested or the work in the portfolio does not meet the required standards the certificate may be considered invalid. In these circumstance OCR may request the return of the certificate for withdrawal. Centres are expected to support learners to complete work to meet the standards and/or enable OCR to sample the portfolio.
- Please note that centre practice that has resulted in OCR issuing an invalid certificate is considered to be malpractice as defined in the [JCQ Suspected Malpractice: Policies and Procedures document](#) and which the Head of Centre may be required to investigate. This may result in sanctions and/or penalties being imposed on the centre and/or member(s) of staff in the centre.
- Centres must ensure that an EQA visit takes place before they close, withdraw from delivering the qualification and/or the last certification date of a qualification. All learners claimed by DCS since the last EQA visit must be included for sampling by the EQA at the final visit.

- Direct Claims Status will be withdrawn from all centres 3 months before the last certification date of a qualification or after the final EQA visit to the centre, whichever is sooner.
- The decision on whether DCS is awarded, retained or withdrawn lies with OCR. OCR reserves the right to remove DCS at any time without notice.

## Direct Claim Status additional quality checks

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- Your candidate claims record will be requested and reviewed by OCR (not the EQA) **as additional short notice quality checks** of DCS claims **made by centres between EQA visits**.
- Copies of your candidate claims record may be requested over the course of the year depending on the number of DCS claims which are made.
- When requested, you will need to email us a copy of the record **within three working days**.
- We will then check your candidate claims record against your DCS claims on our system and let you know if there are any issues or not.
- Please refer to the [OCR criteria for verified qualifications](#) in respect of sanctions that may be imposed if issues are identified during a short notice quality check.

## 5.23 Reporting suspected malpractice

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It is the responsibility of the Head of Centre<sup>1</sup> to report all cases of suspected malpractice involving centre staff or learners. A JCQ Report of Suspected Malpractice form (JCQ/M1 for learner suspected malpractice or JCQ/M2 for staff suspected malpractice) is available to download from the [JCQ website](#) and should be completed as soon as possible and emailed to [malpractice@ocr.org.uk](mailto:malpractice@ocr.org.uk).

When asked to do so by OCR, Heads of Centres are required to investigate instances of malpractice promptly and report the outcomes to OCR.

More information about reporting and investigating suspected malpractice and the possible sanctions and penalties which could be imposed, is contained in the [JCQ Suspected Malpractice Policies and Procedures document](#) available from the [JCQ website](#). Centres may also like to refer to the [OCR Website](#) for more details.

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<sup>1</sup> This is the most senior officer in the organisation, directly responsible for the delivery of OCR qualifications, e.g. the Head Teacher or Principal of a school/college. The Head of Centre accepts full responsibility for the correct administration and conduct of OCR assessments

# 6 Supporting Documentation

## 6.1 OCR assessment material

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The following materials are available on our website:

Support materials

- Guidance for learners
- Chief Verifier annual report.

Assessment recording forms which can be used in learners' portfolios:

- Evidence record sheet
- Record of achievement.

We recommend that your centre uses the assessment documents listed. You are free to design your own recording sheets for your learners to use, but you must make sure that they capture similar information to the OCR recording documents and are acceptable to the centre's OCR EQA.

## 6.2 Our professional development programme

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As part of our teacher training, we offer a broad range of courses. We are constantly looking for ways to improve the support we offer you and to make our professional development programme more accessible and convenient to all.

To find out more about professional development, please visit our [website](#).

## 6.3 Useful documents and links

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OCR	<a href="#">OCR's Administration area</a> <a href="#">OCR's criteria for verified qualifications</a> <a href="#">What is malpractice?</a>
JCQ	<a href="#">Access arrangements, reasonable adjustments and special considerations</a> <a href="#">Suspected Malpractice Policies and Procedures</a>
Ofqual	<a href="#">Ofqual website</a> <a href="#">Register of Regulated Qualifications</a>
QiW	<a href="#">Qualifications in Wales</a> database (QiW)

## 6.4 Unique Learner Numbers (ULN)

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This is a personal ten-digit number, which is used to make sure learner achievement information can be provided to their Personal Learning Record (PLR). ULNs are provided and administered by the Learning Records Service (LRS).

Learners over the age of 14 in UK education or training can access the PLR using their ULN. Learners keep the same ULN to access their PLR throughout their lives and whatever their level of learning.

Learners that claim certification for publically funded qualifications must have a valid ULN.

Where a learner has a ULN, you must enter their ten digit number in the ULN field when making entries via Interchange. For learners who do not have a ULN, a claim will still be accepted if you leave this field blank, but OCR will not be able to send these achievements to the PLR.

For more information, and to generate a ULN, please refer to the [Learning Records Service](#).

# 7 Certification

Learners who achieve the full qualification will receive:

- a unit certificate listing the unit or units achieved, with their related credit value and the unit reference number(s), and
- a certificate stating the full qualification title and the qualification number.

Learners who achieve one or more units but who do not meet the credit requirements for a full qualification will receive a certificate listing the units they have achieved along with their credit value.

## 7.1 Claiming certificates

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Certificates (unit and/or full award) issued for learner will be sent to your centre for distribution. In order to make sure that these are automatically issued, you must make sure that the OCR learner number is **always** used where a learner has already achieved one or more units. For more details refer to the [OCR Administration area – Certificates](#).

Please ensure you carry out careful checks before making certification claims to avoid incorrect/invalid certificates being issued. Before submitting a claim, carefully check to make sure the correct units have been selected and the correct grades have been entered. You must check each certificate you receive before handing it to the learner.

## 7.2 Assessment review/appeals

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Learners appealing against their assessor's assessment decision should follow the centre's appeal process.

If a centre wishes to appeal against the OCR EQA's assessment decision, they should request that their EQA submit their appeal to the Chief EQA.

Centres can appeal against the outcome of a malpractice case and sanctions imposed due to non-compliance with the OCR criteria.

To find out more about these, please refer to [OCR Administration area - Post result services](#).

## 7.3 Replacement certificates

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For details on replacement certificates refer to the [OCR Administration area – Certificates](#).

# 8 Other information

## 8.1 Avoidance of bias

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We have taken great care in the preparation of this qualification to avoid bias of any kind. Special focus is given to the eight strands of the Equality Act with the aim of ensuring both direct and indirect discrimination is avoided.

## 8.2 Regulatory requirements

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We will assess this qualification in accordance with the qualifications regulator's General Conditions of Recognition.

## 8.3 Collecting evidence of learner performance to ensure resilience in the qualifications system

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Regulators have published guidance on collecting evidence of learner performance as part of long-term contingency arrangements to improve the resilience of the qualifications system.

This vocational qualification is being used to confirm occupational competence, all assessment will still need to be completed for the qualification to be awarded.

For more detailed information on collecting of evidence of learner performance please visit our [website](#).

## 8.4 Mode of delivery

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OCR does not specify the mode of study or specify a time limit for the achievement of these qualifications other than the expiry dates for entry and certification laid down by the regulatory authorities detailed in the qualification profiles.

Centres are free to deliver this qualification using any mode of delivery that meets the needs of their learners. Whatever mode of delivery is used, centres must ensure that learners have appropriate access to the resources identified below.

Centres should consider the learners' complete learning experience when designing learning programmes. This is particularly important in relation to learners studying part time alongside real work commitments where learners may bring with them a wealth of experience that should be utilised to maximum effect by centre staff.

## 8.5 Delivery in Wales

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Learners in Wales should not be disadvantaged by terms, legislation or aspects of government that are different from those in England. Where such situations might occur, we have used neutral terms so learners may apply whatever is appropriate to their own situation.

We will provide handbooks and supporting documentation in English. Only answers provided in English will be assessed.

## 8.6 Recognition of Prior Learning (RPL)

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Recognition of prior learning (RPL) is the process for recognising learning that never received formal recognition through a qualification or certification. This includes knowledge and skills gained in school, college or university and outside formal learning situations. Evidence can draw on any aspect of a learner's prior experience including:

- domestic/family life
- education
- training
- work activities
- voluntary activities.

We encourage the use of RPL and your centre should tell learners that they can bring forward any relevant learning (gained either informally or formally) so that it can be assessed against the assessment criteria specified in the unit, or units, the learner aims to complete. It is important that your centre make it clear to learners that the RPL process is concerned with how the learner has acquired the knowledge, understanding or skills, it does not mean the learner is exempt from the assessment e.g. mandatory exams, practical/theory tests or assignments.

The currency of knowledge and ability is often important when recognising skills and competences. Where assessment is devolved to centres through assignments or portfolio-building, centre staff must judge the relevance of prior learning in all its aspects (including currency) to the qualification being assessed before we will quality assure and authorise certification.

Evidence obtained through the RPL process must be assessed, to the same rigorous quality as evidence obtained through any other process.

## 8.7 Accessibility

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There can be adjustments to standard assessment arrangements on the basis of the individual needs of learners.

It is important, therefore, that your centre identifies as early as possible whether learners have disabilities or particular difficulties that will put them at a disadvantage in the assessment situation and select an appropriate qualification or adjustment that will allow them to demonstrate attainment.

The responsibility for providing adjustments to assessment is shared between the centre and OCR. Please read JCQ [Access Arrangements Reasonable Adjustments and Special Considerations](#).



For further guidance on access arrangements and special consideration refer to the Administration area of the OCR website.

If the tutor/assessor thinks any aspect of this qualification unfairly restricts access and progression, please [email](#) or call the [OCR Customer Support Centre](#).

# 9 Contacting us

## 9.1 Feedback and enquiries

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We aim to provide consistently great customer service and your feedback is invaluable in helping us to achieve our goal. For questions about our qualifications, products and services, please contact the [Customer Support Centre](#). To leave your feedback on the OCR website, people and processes please use our [feedback form](#).

Telephone: 01223 553998  
Email: [support@ocr.org.uk](mailto:support@ocr.org.uk)

Alternatively, you could visit [OCR's website](#) for more information about OCR qualifications.

## 9.2 Complaints

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We are committed to providing a high quality service but understand that sometimes things can go wrong. We welcome your comments and want to resolve your complaint as efficiently as possible. To make a complaint please follow the process set out in our [complaints policy](#).

# 10 Glossary

## 10.1 Command words

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<b>Analyse</b>	Examine in very close detail, identify important points and main features.
<b>Critically analyse</b>	Consider the claims of theorists, governments, authorities etc., what they are based on and how far they seem to apply to a given situation.
<b>Apply</b>	Put into operation or use. Use relevant skills/knowledge/understanding appropriate to context.
<b>Assess</b>	Offer a reasoned judgement of the standard/quality of situation/skills informed by relevant facts.
<b>Compare</b>	Identify similarities and differences.
<b>Consider</b>	To think about the content of a topic, options and what to do next.
<b>Contrast</b>	Identify differences.
<b>Critique</b>	To subjectively review information/views and offer different perspectives.
<b>Demonstrate</b>	Show in an explicit way.
<b>Define</b>	State or describe the nature, scope or meaning.
<b>Deliver</b>	To provide information or activity.
<b>Describe</b>	Give an account, including all the relevant characteristics, qualities, or events.
<b>Determine</b>	Find out, decide, e.g. what is relevant. To find a solution by following a set of procedures or to obtain a numerical value by carrying out a series of calculations.
<b>Discuss</b>	Give an account that addresses a range of ideas and arguments.
<b>Establish</b>	To show something is true by confirming or determining the facts.
<b>Evaluate</b>	To consider the worth or value of something and to make a judgement by discussing its strengths and weaknesses.
<b>Critically evaluate</b>	To consider the worth or value of something and to make a judgement by discussing its strengths and weaknesses. Theories, opinions and models will be used when assessing strengths/weaknesses and making judgements.
<b>Examine(d)</b>	To look at, inspect, or scrutinise carefully, or in detail. Investigate closely.
<b>Explain</b>	To give account of the purposes or reasons.

<b>Explore</b>	To find out about something such as a process or theory.
<b>Identify</b>	Recognise, list, name or otherwise characterise.
<b>Inform</b>	To provide through different formats, facts, information or speculation.
<b>Interpret</b>	Translate information into recognisable form. Convey understanding to others, e.g. in a performance. Explain the meaning of something.
<b>Justify</b>	Present a reasoned case for actions or decisions made.
<b>Measure</b>	Establish a value using a suitable measuring instrument or technique.
<b>Monitor</b>	A method or way of checking a process, progress of an activity or record keeping.
<b>Negotiate</b>	To overcome an obstacle by discussion and compromise to reach agreement.
<b>Outline</b>	A description setting out main characteristics/points.
<b>Plan</b>	Consider, set out and communicate what is to be done.
<b>Present</b>	Produce an exposition/resumé for an audience, e.g. at the conclusion of the project to demonstrate what has been done and the outcome.
<b>Promote</b>	Put forward and emphasise a particular course of action or possible solution.
<b>Recommend</b>	Suggest/put forward as being appropriate, with reasons why.
<b>Reflect</b>	Look back upon and appraise, relate to, e.g. to stated aims. Give contemplative, balanced consideration to an issue or action.
<b>Research</b>	Investigation into and study of materials and sources to establish facts and reach conclusions.
<b>Review</b>	Survey information, methods, outcomes, conclusions, after the event, deciding what was effective or not.
<b>Summarise</b>	To sum up or to put things into your own words or to create a precis of the information discussed.
<b>Understand</b>	To interpret and make sense of the meaning of different forms of communicated information or views.
<b>Use</b>	Apply the information provided or apply prior learning. To put into service or action. Employ for a given purpose.

## 10.2 Sector specific words

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<b>On-going support</b>	Support clients on an ongoing basis to help them to progress their plan of action This could be where the client is working directly with you or where a particular aspect of their case has been referred to another service.
<b>Referral</b>	Determine a more detailed picture of the needs of the client and then obtaining a booked appointment for the client with another agency, where the referring agency for reasons of specialism or capacity is unable to assist the client further.
<b>Signposting</b>	Where a client is simply directed to one or more appropriate sources of information, advice or guidance. An example of this would be giving the client telephone numbers of local agencies.

For more information visit

 [ocr.org.uk](https://ocr.org.uk)

 [facebook.com/ocrexams](https://facebook.com/ocrexams)

 [twitter.com/ocrexams](https://twitter.com/ocrexams)

 [instagram.com/ocrexaminations](https://instagram.com/ocrexaminations)

 [linkedin.com/company/ocr](https://linkedin.com/company/ocr)

 [youtube.com/ocrexams](https://youtube.com/ocrexams)

Call our customer support centre on

**01223 553998**

Alternatively, you can email us on

**[support@ocr.org.uk](mailto:support@ocr.org.uk)**

Visit our online support centre at

**[support.ocr.org.uk](https://support.ocr.org.uk)**



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