

Unit Title:	Personal information management software
OCR unit number:	53
Level:	1
Credit value:	2
Guided learning hours:	15
Unit reference number:	Y/502/4369

Unit purpose and aim

This is the ability to use software designed for the purpose of managing and organising contacts, appointments, tasks and notes. Software may also be termed Personal Planning software.

This unit is about the skills and knowledge to use a range of basic personal information management tools and techniques to organise and plan their own time and tasks.

Learning Outcomes	Assessment Criteria	Examples
<p>The learner will:</p> <p>1 Use a calendar to schedule appointments</p>	<p>The learner can:</p> <p>1.1 Create, edit and delete calendar entries</p> <p>1.2 Arrange recurring appointments</p> <p>1.3 Invite others to meetings and monitor attendance</p> <p>1.4 Respond to meeting requests from others</p> <p>1.5 Create reminders for calendar appointments</p> <p>1.6 Organise and display appointments as required</p>	<p>Recurring appointments: Daily, weekly, monthly, yearly</p> <p>Invite to meetings: Check personal availability</p> <p>Display appointments: On screen, for print; display style (month, week, day)</p>
<p>2 Use a task list to prioritise activities</p>	<p>2.1 Create, edit and delete task information</p> <p>2.2 Organise and display tasks, setting targets for completion</p> <p>2.3 Monitor task progress and set reminders</p> <p>2.4 Report on task status and activity</p>	<p>Organise tasks: By category, status, target date; assign and respond to task requests</p> <p>Task progress: Percentage completion; filters</p>
<p>3 Use an address book to store, organise and retrieve contact information</p>	<p>3.1 Create, edit and delete contact information</p> <p>3.2 Organise and display contact information</p> <p>3.3 Set up a distribution list</p> <p>3.4 Describe why it is important use personal data responsibly and</p>	<p>Organise contacts: By name; customise display; selected fields; filters</p> <p>Responsible use: Password protection, Respect confidentially; public profiles; trust, data protection</p>

Learning Outcomes	Assessment Criteria	Examples
	safely 3.5 Outline why and how to keep contact information up to date	

Assessment

All ITQ units may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met. Assessments must also take into account the additional information provided in the unit Purpose and Aims relating to the level of demand of:

- the activity, task, problem or question and the context in which it is set;
- the information input and output type and structure involved; and
- the IT tools, techniques or functions to be used.

See the Assessment and postal moderation section of the [ITQ Centre Handbook](#).

Evidence requirements

Candidates must complete the Evidence Checklist without gaps for this unit. Individual unit checklists are available to download from the qualification [webpage](#) (see forms).

Guidance on assessment and evidence requirements

Please refer to the ITQ centre handbook on our [webpage](#).

Details of relationship between the unit and national occupational standards

This unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009).