

STATEMENT OF WORK EXPERIENCE/LOGBOOK

Instructional Programme Code:	50904410 National N Diploma: Management Assistant
SAQA Qualification ID:	90674: National N Diploma, NQF Level 6, 360 credits
SAQA Learning Programme ID:	67033: National N Diploma: Management Assistant, NQF Level 6, 360 credits

Learner Details	
Name & Surname:	
ID Number:	

Employer Details	
Company Name:	
Address:	
Supervisor Name:	
Work Telephone:	
E-Mail:	

Employer Details	
Company Name:	
Address:	
Supervisor Name:	
Work Telephone:	
E-Mail:	

Management Assistant Compulsory subjects:	
<ul style="list-style-type: none"> • Office Practice 	
<ul style="list-style-type: none"> • Information Processing 	
Additional:	
<ul style="list-style-type: none"> • Workplace Competencies 	

Office Practice

WM-01	Meeting preparation		
	Scope Work Experience	Date	Signature
WA0101	Provide a range of dates and times for meeting/event to attendees.		
WA0102	Finalise suitable dates and, times based on responses to range of dates provided.		
WA0103	Send out meeting invitation and confirm meeting/event with attendees in writing.		
WA0104	Forward all related documentation to the attendees according to prescribed deadlines.		
	Supporting Evidence	Date	Signature
SE0101	Meeting preparation checklists		
SE0102	Invitations		
SE0103	Proof of confirmations and apologies		
SE0104	Supporting documents: meeting packs, research documents, briefing documents, newspaper clippings, and internet links.		
WM-02	Arrange venue and catering		
	Scope Work Experience	Date	Signature

WA0201	Identify, select and book a venue according to company procedures and processes.		
WA0202	Confirm special arrangements, logistics, meeting room layout and equipment required with the venue provider/ meeting convenor (for internal meeting).		
WA0203	Confirm site visit and any special arrangements, logistics, meeting room layout and equipment required with the venue provider/ meeting convenor (for external meetings)		
WA0204	Apply the process of selecting a caterer and menu, taking into consideration religious, dietary requirements and company policy.		
WA0205	Forward the Agenda for meeting/event to venue provider and caterers to ensure correct times for meals and breaks are adhered to.		
WA0206	Notify the venue provider and caterers in writing and ensure order is issued and sent or deposits paid, with final confirmation a day prior to event/meeting.		
	Supporting Evidence	Date	Signature
SE0201	Purchase order, proof of receipt by venue provider and caterer and confirmation of dietary requirements		
SE0202	Confirmation of venue booking, service providers and contact details		
SE0203	Ticked off checklist of site visit and audio-visual equipment pre- and post-meeting		
SE0204	Proof of delivery of requested dietary requirements		
SE0205	Agenda		
WM-03	Make travel, car hire and accommodation arrangements		

WA0301	Determine travel, car hire and accommodation requirements for all attendees are required.		
WA0302	Secure suitable accommodation and confirm bookings in writing.		
WA0303	Identify car hire facilities and or flight bookings and confirm in writing.		
WA0304	Process invoices relating to travel, car hire and accommodation.		
WA0305	Process all relevant advance disbursements for travel, car hire or accommodation.		
WA0306	Forward all necessary travel arrangements documentation to the attendees.		
	Supporting Evidence	Date	Signature
SE0301	Booking confirmation		
SE0302	Vouchers for car hire and accommodation, flight ticket		
SE0303	Purchase orders, quotations, invoices and proof of payment		
WM-04	Assemble and distribute documentation for meeting or event		
WA0401	Establish the deadline date for receipt of documentation from contributors and then communicate agreed time frames to contributors.		
WA0402	Assemble, copy and collate documents and timeously distribute relevant documentation in hard or electronic format as per agreed time frames to attendees.		
	Supporting Evidence	Date	Signature
SE0401	Meeting packs		
SE0402	Proof of communication to contributors/ attendees		

WM-05	Conduct a meeting		
WA0501	Summarise and record discussions to indicate proposed action, completion date and person responsible.		
WA0502	Check records to ensure that they are an accurate reflection, prior to distribution.		
WA0503	Distribute records for a meeting.		
	Supporting Evidence	Date	Signature
SE0501	Minutes of meetings		
SE0502	Attendance register		
WM-06	Coordinate and support office services		
	Scope Work Experience	Date	Signature
WA0601	Apply appropriate procedures to schedule meetings, appointments, travel and accommodation for the supervisor/ office		
WA0602	Manage the flow of documents according to the company's policies and procedures		
WA0603	Register incoming and outgoing documents of the office for effective information management		
WA0604	Check the availability of budget prior to procurement of goods or services		
WA0605	Source quotations for the procurement of goods and services for the unit		
WA0606	Manage the assets of the unit according to an organizational policy		
WA0607	Prepare meeting packs, agenda's, and audio visual aids for presentations		
WA0608	Proofread all incoming documentation and edit where possible prior to further distribution to supervisor		

WA0609	Complete forms in accordance with company procedures		
WA0610	Schedule and confirm appointments for clients, customers, or supervisors		
WA0611	Make copies of correspondence or other printed material		
WA0612	Locate and attach appropriate files to incoming correspondence requiring replies.		
WA0613	Review work done by others to check for correct spelling and grammar, ensure that company format policies are followed, and recommend revisions.		
WA0614	Open, read, route, and distribute incoming mail or other materials and answer routine letters.		
WA0615	Order and dispense supplies.		
WA0616	Manage projects or contribute to committee or team work.		
	Supporting Evidence	Date	Signature
SE0601	Schedule of Appointments		
SE0602	Memorandum		
SE0603	Fax reports		
SE0604	Bookings and travel documents		
SE0605	Quotations		
SE0606	Budget and Accounts		
SE0607	Assets register, visitors register, remittance register, firearm register, incoming and outgoing documents register, complaints/resolution register etc.		
SE0608	Meeting correspondence		
SE0609	Media scanning		

SE0610	Procurement		
SE0611	Edited copies of documentation (accuracy, spelling, format)		
SE0612	Responses to queries		
SE0613	Records of office services		
WM-07	Manage the office layout and work routine to facilitate a 'paperless' office		
	Scope Work Experience	Date	Signature
WA0701	E- File documentation accordingly		
WA0702	Schedule appointments using an electronic diary		
WA0703	Maintain scheduling and event calendars		
WA0704	Set up the office/work area to facilitate peak performance considering the following factors: Lighting, ventilation, temperature, colour, noise, hygienic conditions		
WA0705	Create a checklist/guide for health and emergency procedures for office staff		
WA0706	Do research on how an ergonomic office contributes to better productivity and prepare a guide to be used when procuring goods and furniture for the office		
WA0707	Send, receive, file and archive e-mails according to company processes and procedures		
WA0708	Compile a list of guidelines for compiling correspondence		
WA0709	Operate office equipment, such as fax machines, copiers, computer or phone systems and arrange for repairs when equipment malfunction		
WA0710	Set up and manage paper or electronic filing systems, recording information, updating paperwork, or maintaining documents, such as attendance records, correspondence, or other material		

WA0711	File documents according to processes and procedures		
	Supporting Evidence	Date	Signature
SE0701	E- Filing		
SE0702	Business letters/concise, meeting documentation, reports and advertising, invoices, reports, memos, letters, financial statements		
SE0703	Carry out all work activities according to the code of conduct and within the security requirements of the organisation.		
SE0704	File electronic documentation according to organisational requirements.		
SE0705	Complete filing within organisational timeframes and standards		
SE0706	Sort, classify and store all materials in a safe and secure manner		
WM-08	Apply basic knowledge of Human resource related legislative, governance, policies and procedures		
	Scope Work Experience	Date	Signature
WA0801	Check the leave forms and absenteeism registers on a daily basis.		
WA0802	Identify the types of leave and match the leave forms with the registers.		
WA0803	Send relevant information to the HR office as per organizational policies.		
WA0804	Answer basic questions regarding leave and seek information regarding policies.		
WA0805	Compile a report detailing queries regarding the employee handbook or orientation manual and update manager		
WA0806	Observe and record any violations of labour act according to employment act		
WA0807	Establish work procedures or schedules and keep track of the daily work of clerical staff		

WA0808	Supervise other clerical staff and provide training and orientation to new staff.		
WA0809	Supervise clerical or administrative personnel.		
WA0810	Train personnel on latest development and processes related to office administration.		
WA0811	Assist in compiling HRM and HRD documents		
	Supporting Evidence	Date	Signature
SE0801	Checked copies of relevant leave forms		
SE0802	Updated absenteeism register		
SE0803	Employee handbook and contracts		
SE0804	Orientation manual		
SE0805	Checklist for basic Compliance : <ul style="list-style-type: none"> ➤ BCEA ➤ OHS Act 		
WM-09	Communicate effectively using appropriate methods to maintain effective customer relationships according to organisational standards		
	Scope Work Experience	Date	Signature
WA0901	Respond to queries and enquiries		
WA0902	Interact with clients via telephone or in branch		
WA0903	Contact clients to obtain or relay information		
	Supporting Evidence	Date	Signature
SE0901	Enquiry and query register		
SE0902	Personal clients register with contact details		
WM-10	Customer service of internal and external stakeholders		

	Scope Work Experience	Date	Signature
WA1001	Answer telephones to direct calls or provide information.		
WA1002	Greet customers, patrons, or visitors		
WA1003	Refer customers to appropriate personnel.		
WA1004	Provide information telephonically ,email , social media in context to a client		
	Supporting Evidence	Date	Signature
SE1001	Telephonic voice records/telephone book		
SE1002	Emails		
SE1003	Letters		
SE1004	Customer feedback forms		
SE1005	Faxes		
SE1006	Register of correspondence		
WM-11	Apply supervisory skills to coordinate and direct clerical staff activities		
	Scope Work Experience	Date	Signature
WA1101	Ensure meetings are effectively organised and minutes are taken		
WA1102	Apply an organisation information management system for effective records management		
WA1103	Apply and uphold appropriate legal requirements in ensuring the organisation		
WA1104	Allocate work activities to clerical staff according to set standards of the organization and monitor performance		
WA1105	Provide advice and on-going feedback about the employee's performance		

WA1106	Arrange, coordinate and provide training of clerical staff for continuous professional development		
WA1107	Provide monitoring, control and evaluation of office activities		
	Supporting Evidence	Date	Signature
SE1101	Work schedule		
SE1102	Performance agreements		
SE1103	E-mails		
SE1104	Guideline documents		
SE1105	Memorandums to staff		
SE1106	Scheduled Sectional/Staff Meetings		
SE1107	Notes from briefing session		
WM--12	Manage resources according to good governance policies and procedures		
	Scope Work Experience	Date	Signature
WA1201	Apply the organisational policies and procedures in relation to resource management		
WA1202	Maintain a database of service providers		
WA1203	Facilitate and track quotes		
WA1204	Manage petty cash system		
WA1205	Sign receipt for goods and/or cash received		
WA1206	Record income and expenditure of the unit		

WA1207	Disburse money for Petty Cash transactions.		
WA1208	Petty Cash voucher is completed and till slip is attached in accordance with purchases made		
WA1209	Assist in basic procurement and requisition		
WA1210	Do inventory and stock control and maintain asset register of the relevant department		
WA1211	Dispose of assets according asset policy of the organisation		
WA1212	Manage the consumables of the unit by controlling the consumable stock register		
	Supporting Evidence	Date	Signature
SE1201	Petty cash vouchers		
SE1202	Purchase orders		
SE1203	Quotations		
SE1204	Banking (EFT Payments, cheques)		
SE1205	Consumable stock control register		
SE1206	Requisitions		
WM-13	Apply basic knowledge of relevant legislative, governance, policies and procedures		
	Scope Work Experience	Date	Signature
WA1301	Check the leave forms and absenteeism registers on a daily basis.		
WA1302	Identify the types of leave and match the leave forms with the registers.		
WA1303	Send relevant information to the HR office as per organizational policies.		
WA1304	Answer basic questions regarding leave and seek information regarding policies.		

WA1305	Compile a report detailing queries regarding the employee handbook or orientation manual and update manager		
WA1306	Observe and record any violations of labour act according to employment act		
	Supporting Evidence	Date	Signature
SE1301	Checked copies of relevant leave forms		
SE1302	Updated absenteeism register		
SE1303	Employee handbook		
SE1304	Orientation manual		
SE1305	Checklist for basic Compliance : <ul style="list-style-type: none"> ➤ BCEA ➤ OHS Act 		
WM-14	Apply OHS policies and procedures		
	Scope Work Experience	Date	Signature
WA1401	Create a checklist/guide for health and emergency procedures for office staff		
WA1402	Comply with local, and company health and safety regulations.		
WA1403	Demonstrate knowledge of facility guidelines to ensure physical safety of customers, attendees, employees, and organizers including emergency shutdown procedures		
WA1404	Be aware of evacuation routes, fire extinguisher location and use, shut-down procedures and safety manuals		
WA1405	Explain the importance of disseminating information to customers addressing potential safety hazards and security issues, e.g., display safety and security information and materials in a public area.		
WA1406	Maintain a sanitary and clutter-free work environment.		

WA1407	Use equipment and tools safely		
WA1408	Know to whom one should report any safety hazards or suspicious people or activity		
WA1409	Create a resource base to manage emergency situations.		
	Supporting Evidence	Date	Signature
SE1401	Checklist for basic Compliance : ➤ BCEA OHS Act		
SE1402	Signs for safety procedures in relevant places		
SE1403	Evacuation plans		

Information Processing

WM-01	Use Computer application software/ technology in an office environment		
	Scope Work Experience	Date	Signature
WA0101	Produce business documents using audio equipment or software e.g. short letters, circulars, letters of promotion, itineraries, fanfold brochures, financial statements, mail merge etc.		
WA0102	Demonstrate the skill of Touch Typing		
WA0103	Process reports		
WA0104	Produce meeting documents		
WA0105	Edit and enhance an existing presentation and understand and demonstrate the use of master templates		
WA0106	Adjust the use of graphs and charts in presentations		
WA0106	Demonstrate on-screen presentations		
	Supporting Evidence	Date	Signature
SE0101	Computerised documents e.g. short letters, circulars, letters of promotion, itineraries, fanfold brochures, financial statements		
SE0102	Useful and attractive presentations documents		
WM-02	Performing typing and word processing tasks in a business environment		
	Scope Work Experience	Date	Signature
WA0201	Create/type a variety of business-related letters and other correspondence using word processing software, depending on the nature of the business, on a letter head (where necessary)		
WA0202	Type documents relating to meetings		
WA0203	Create/type other documents, using word processing software, as required		

WA0204	Maintain electronic data through file and folder management using system software (eg Windows)		
WA0205	Apply word processing functions and formatting effectively to produce quality word processing documentation		
	Supporting Evidence	Date	Signature
SE0201	Letters concerning sales/marketing, orders, complaints, adjustments, dealing with enquiries, follow-up, recommendation, acknowledgement, resignation, employee-related letters (job offer, appointment, reference, termination etc), and cover letters		
SE0202	Notice of meeting, agenda, minutes		
SE0203	Examples: Circulars, itineraries, formal invitations, reports, statements, general notices, event material, promotional material, policies/procedures, registers, databases, and other documents as required		
SE0204	Well maintained file and folder/sub folder structure: Correct listing of files under relevant folder/sub folder categories, searching for files, copy / move / rename / delete files and folders		
SE0205	Effective use of the following functions : creating / saving / retrieving documents, editing / inserting / deleting text, spelling and grammar check, undo actions, move and copy text (copy/cut & paste), page layout, inserting tables & columns, adding headers and footers, page and section breaks, various printing options, and mail merge.		
SE0206	Effective use of formatting options for font (type, size, colour, style, subscript/superscript & other effects), paragraph settings (alignment, indentation, spacing, bullets and numbering, shading and borders), and ASCII codes.		
SE0207	Accuracy is of the utmost importance in all of this. Documentation and letters should be typed accurately in the time given.		

Workplace Competencies

WM01	Personal Effectiveness Competencies		
	Scope Work Experience		
WA0101	Demonstrate sensitivity to the needs and feelings of others	Date	Signature
WA0102	Look for ways to help people and deliver assistance		
WA0103	Show understanding of others' behaviors and motives by demonstrating appropriate responses		
WA0104	Interact respectfully and cooperatively with others who are of a different race, culture, or age, or have different abilities, gender, or sexual orientation		
WA0105	Perform work-related duties according to laws, regulations, contract provisions, and company policies		
WA0106	Use company time and property responsibly		
WA0107	Take responsibility for accomplishing work goals within accepted timeframes.		
WA0108	Deal calmly and effectively with stressful or difficult situations.		
WA0109	Dress appropriately for occupational and worksite requirements		
WA0110	Project a professional image of oneself and the organization		

WA0111	Easily adapt plans, goals, actions, or priorities in response to unpredictable or unexpected events, pressures, situations, and job demands		
WA0112	Effectively communicate with all members of the group or team to achieve team goals and objectives		
WA0113	Provide prompt, efficient, and personalized assistance to meet the requirements, requests, and concerns of customers.		
WM02	Select, use, and maintain tools and technology to facilitate work activity		
WA0201	Operate tools, technology, and equipment in accordance with established operating procedures and safety standards		
WA0202	Seek out opportunities to improve knowledge of tools and technologies that may assist in streamlining work and improving productivity		
WA0203	Perform routine maintenance on tools, technology, and equipment		