

The Learner must complete the relevant part/s of the Administrative documents. Failure to do so may compromise the release of your results. Your details will be treated as confidential. The grey areas are for office use. Please complete the white areas of the following documents:

### A. Portfolio Assessment Checklist

**Unit Standard 230077: Describe the financial life cycle of an individual and how this influences financial decisions**

<b>Important:</b> Please fill in this checklist and submit together with your completed portfolio. Remember to explain the absence of any of the required evidence. Please tick <input checked="" type="checkbox"/> if included; cross <input type="checkbox"/> if not.		
Evidence Requirement	Incl.	Comment
Cover sheet (including name and purpose)	<input type="checkbox"/>	
Contents page	<input type="checkbox"/>	
Assessor documentation <ul style="list-style-type: none"> <li>• POE checklist</li> <li>• Overall competence record</li> <li>• Self-review documentation</li> <li>• Learner assessment evaluation questionnaire</li> </ul>	<input type="checkbox"/>	
Evidence comprising <ul style="list-style-type: none"> <li>• SO1</li> <li>• SO2</li> <li>• SO3</li> <li>• SO4</li> </ul>	<input type="checkbox"/>	
Supplementary evidence <ul style="list-style-type: none"> <li>• Researched articles, newspaper clippings, journal extracts etc (on or offline)</li> <li>• Testimonials e.g. HR manager</li> </ul>		<b>*Learner to note if supplementary evidence has been included</b>
Registered standards / qualifications you are claiming	<input type="checkbox"/>	
<p><b>If you do NOT agree with the statements below, please change the tick (<input type="checkbox"/>) to a cross (x):</b></p> <ul style="list-style-type: none"> <li>• I have not committed plagiarism during the compilation of this portfolio of evidence <input type="checkbox"/></li> <li>• The work submitted in this portfolio of evidence is my own authentic work <input type="checkbox"/></li> <li>• Where I have used information from other sources, I have referenced it. <input type="checkbox"/></li> <li>• I understand the assessment plan and assessment process <input type="checkbox"/></li> <li>• I am aware of the remediation/reassessment procedures <input type="checkbox"/></li> <li>• I am aware of the appeals process <input type="checkbox"/></li> <li>• In the event that I have a special need, I have declared it to the provider <input type="checkbox"/></li> </ul>		

**B. Overall Competence Record**

Surname									
First name									
<b>FOR OFFICE USE ONLY</b>									
Unit Standard	<b>230077</b>					<b>Version 1 ✓</b>		<b>Version 2</b>	
Formative Assessment Matrix	1 <sup>st</sup> Judgment					Date			
Specific Outcome/Section	1	2	3	4	5	Total	%	C	NYC
Maximum marks	<b>30</b>	<b>18</b>	<b>11</b>	<b>26</b>		<b>85</b>	<b>100</b>		
Marks achieved									
Feedback to Learner									
Unit Standard	<b>230077</b>					<b>Version 1 ✓</b>		<b>Version 2</b>	
Formative Assessment Matrix	2 <sup>nd</sup> Judgment					Date			
Specific Outcome/Section	1	2	3	4	5	Total	%	C	NYC
Maximum marks	<b>30</b>	<b>18</b>	<b>11</b>	<b>26</b>		<b>85</b>	<b>100</b>		
Marks achieved									
Feedback to Learner									
Formative Assessment Matrix	Final Judgment					Date			
Specific Outcome/Section	1	2	3	4	5	Total	%	C	NYC
Maximum marks	<b>30</b>	<b>18</b>	<b>11</b>	<b>26</b>		<b>85</b>	<b>100</b>		
Marks achieved									

Feedback to Learner					
Summative Assessment Version 1 ✓	Max marks	<b>40</b>	<b>100</b>		
	Marks achieved				
Summative Assessment Version 2	Max marks	<b>40</b>	<b>100</b>		
	Marks achieved				
Assessment of CCFOs					
CCFO	Activities as indicated in Assessment Matrix			Competent	Not Yet Competent
IDENTIFYING					
ORGANISING					
COMMUNICATING					
DEMONSTRATING					
Assessor Name	Assessor No.	Assessor Signature	Competent	Not Yet Competent	
Moderator Name	Moderator No.	Moderator Signature	Upheld	Overturned	

**Disclaimer:** The training provider carries no responsibility for material or Portfolios lost in the workplace or while in the learner's possession.

**General:**

- Course material, which has been lost, will be funded by the learner.
- The learner is responsible for safeguarding his POEs while in his possession.
- The learner is responsible to keep a copy of all Formative assessments.
- The learner must complete the relevant administrative sections of the Formative assessment.
- The learner must attach an original certified copy of his/her ID and National Senior Certificate to the portfolio.

**Plagiarism:**

- The learner is required to understand the work, internalize it and answer questions in his own words.
- The learner may not copy directly from any source without acknowledging the source.
- The learner may not copy from other learners or commit plagiarism in any form.
- In the event that group work is required, the group must be declared and every member's assessment must be their own work.

**Hard copy learners:**

- May not submit work in pencil
- May not use Tippex
- Must write in black pen
- May not allow anyone else to write in his Learner Work File
- Handwriting must remain consistent throughout the Learner Work File

**Competency requirements:**

- In order to be Competent, the learner must achieve a minimum of 50% (or as indicated in the Training Provider's Assessment Policy) for the Formative assessment.
- Marks must be obtained for every assessment, i.e. no gaps are allowed.
- The learner must be Competent on the Formative assessment before he/she may write the Summative assessment.
- In order to be Overall Competent, the learner must achieve a minimum of 50% (or as indicated in the Training Provider's Assessment Policy) for the Summative assessment.

**Remedial opportunities:**

- The learner has 2 remedial opportunities (or as indicated in the Training Provider's Assessment Policy) for the Formative assessment.
- The learner has 1 rewrite opportunity (or as indicated in the Training Provider's Assessment Policy) for the Summative assessment.

**Consequences of non-compliance:**

- The learner's actions will be reported to the employer and to INSETA.
- The learner will be disciplined by the employer.

**Appeals Process:**

- Discuss the issue with the assessor.
- Try to find a solution for the problem
- If there is still a disagreement, submit a written complaint to the internal moderator within two weeks of the assessment.
- The internal moderator will conduct an investigation and meet with both parties.
- A decision will be taken by the internal moderator, who will provide both parties with a report within four weeks.
- If the learner is still unhappy about the outcome, he/she should refer the matter to INSQA.

**C. Learner Self-Review Assessment**

<b>1. How did I cope with this Unit Standard? (Tick the most appropriate box)</b>			
I understand everything	<input type="checkbox"/>	I can apply the unit standard in my working environment	<input type="checkbox"/>
I struggled through it and don't understand much	<input type="checkbox"/>	There are some things I have not yet mastered	<input type="checkbox"/>
<b>2. Write down any areas where you do not have full understanding.</b>			
<b>3. What knowledge that you have gained can be implemented in your area of work?</b>			
<b>4. Was the content (Tick the most appropriate box)</b>			
Easy	<input type="checkbox"/>		
Challenging	<input type="checkbox"/>		
Far too difficult	<input type="checkbox"/>		
<b>5. Was the time allowed (Tick the most appropriate box)</b>			
Too much	<input type="checkbox"/>		
Just right	<input type="checkbox"/>		
Too little	<input type="checkbox"/>		
<b>6. Additional comments</b>			

**D. Learner Assessment Evaluation Questionnaire**

Review Dimension	Yes	No	Comments
Was the content of the Learner Guide clear, relevant and useful?			
Did you understand what was required in the Formative assessment (POE)?			
Were instructions given in clear language?			
Were you able to access help if you needed it?			
Was the evaluation process user-friendly?			
Was the scoring fair and understandable?			
Was feedback and communication acceptable?			
Did the assessment relate to the registered standard?			
Was it time efficient and cost-effective?			
Where applicable, was the equipment functional?			
Were the training provider administrative staff friendly and helpful?			

