Skills Assessment Australia
www.saa.edu.au

Assessment Tool Generator (ATG)
Help file

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SAA-ATG-HELP
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TABLE OF CONTENTS

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INTRODUCTION

This document provides guidance on using the Assessment Tool Generator at www.saa.edu.au/ATG.

Overview

The Assessment Tool Generator automates and streamlines many of the tasks associated with designing and developing fully compliant assessment tools within Australia's Vocational Education and Training (VET) sector. It is also an ideal learning aid for students studying unit TAEASS502 *Design and develop assessment tools*.

The ATG allows users to specify a training unit of competence, and then automates the process of creating an assessment plan (including compliance map) and assessment instruments. However, users are still required to contextualise the assessment instruments to make them relevant to their intended cohort.

There are three primary users of the Assessment Tool Generator:

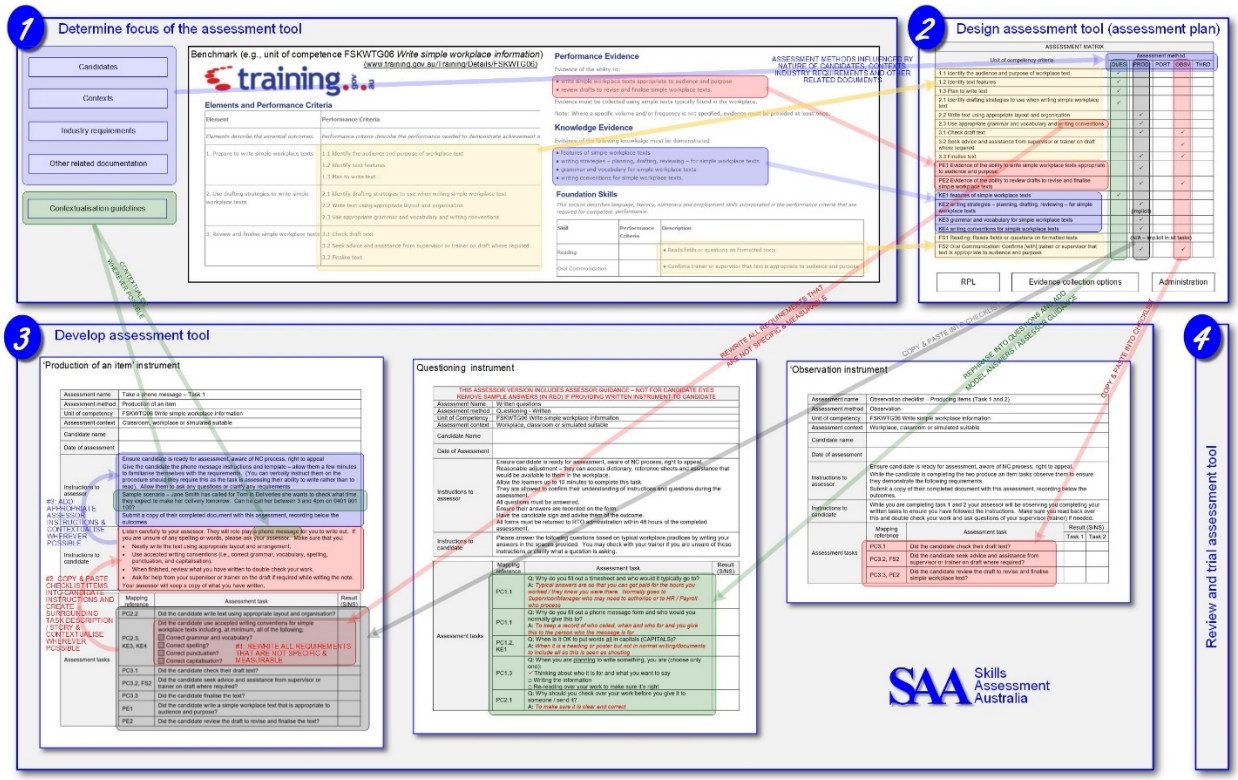
- Students studying the TAE40116 Certificate IV in Training and Assessment and, in particular, unit TAEASS502 *Design and develop assessment tools*.
- TAE trainers who wish to use a learning aid that helps outline the steps and procedures when creating assessment tools.
- Developers of assessment tools who wish to save time and ensure accuracy of the tools that they create.

How it works

The ATG architecture is consistent with the elements of unit TAEASS502 *Design and develop assessment tools* (https://training.gov.au/Training/Details/TAEASS502):

1. Determine the focus of the assessment tool
2. Design the assessment tool
3. Develop the assessment tool
4. Review and trial the assessment tool

This is reflected in the following graphical representation:



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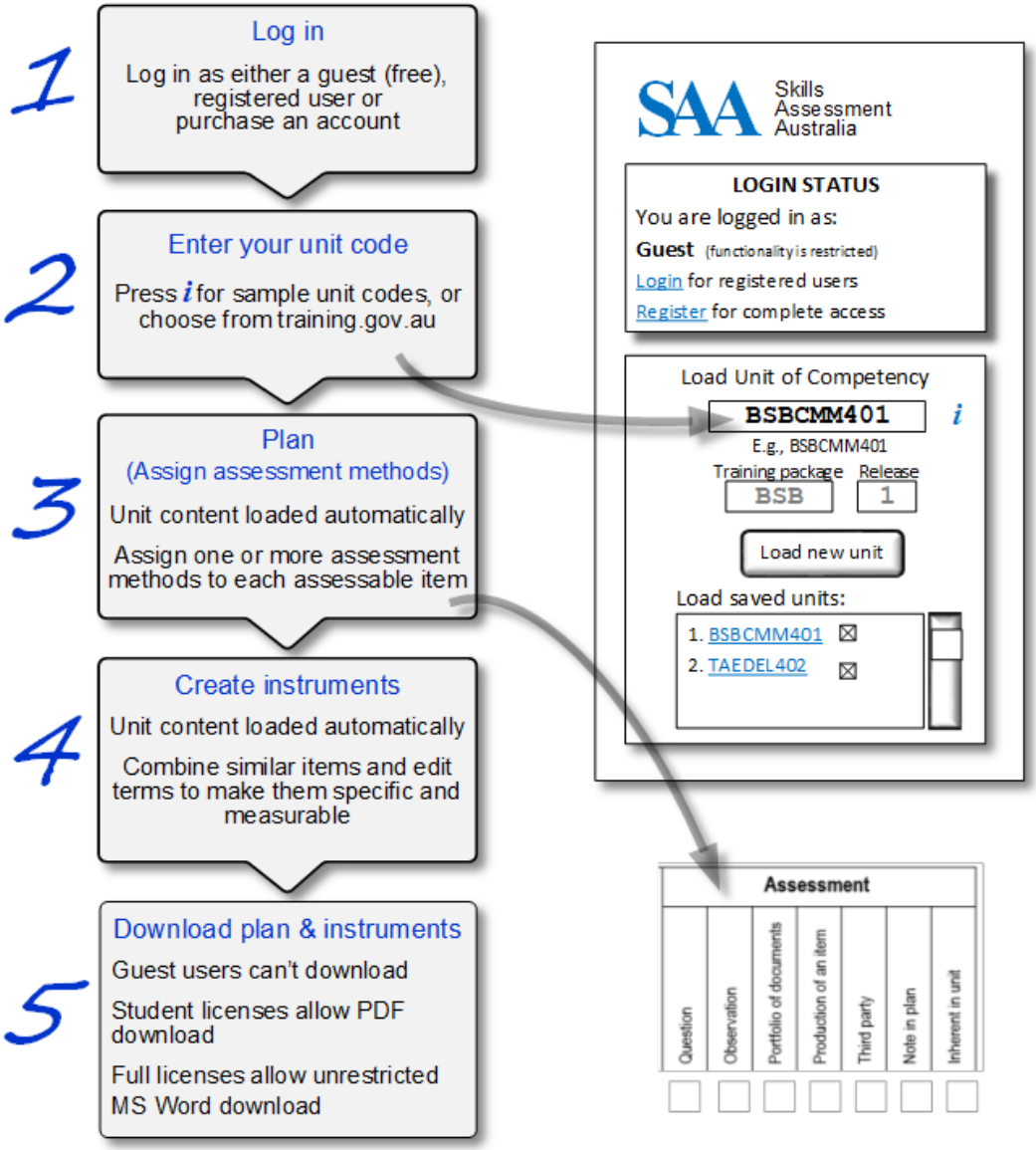
(You can download a copy of this resource from https://www.saa.edu.au/sites/default/files/inline-images/TAEASS502%20graphic_0.jpg)

The Assessment Tool Generator (ATG) helps you generate assessment tools by streamlining and automating the 'mechanical' aspects in their creation, which simplifies the process and saves you time and assessment resubmission attempts:

- Extracts all assessable items from the unit of competency and populates the assessment plan's compliance matrix
- Checks for common errors and mistakes when you assign your preferred assessment methods
- Automatically populates the selected assessment instruments with the unit content (which you then contextualise)
- Allows you to easily merge 'common' assessable items, and
- Generates the assessment plan and assessment instruments (as an editable PDF for student licenses, and MS Word and Excel for unrestricted licenses) in a common industry format, which you then contextualise for your intended cohort.

The ATG is simple to use:



ATG basic process

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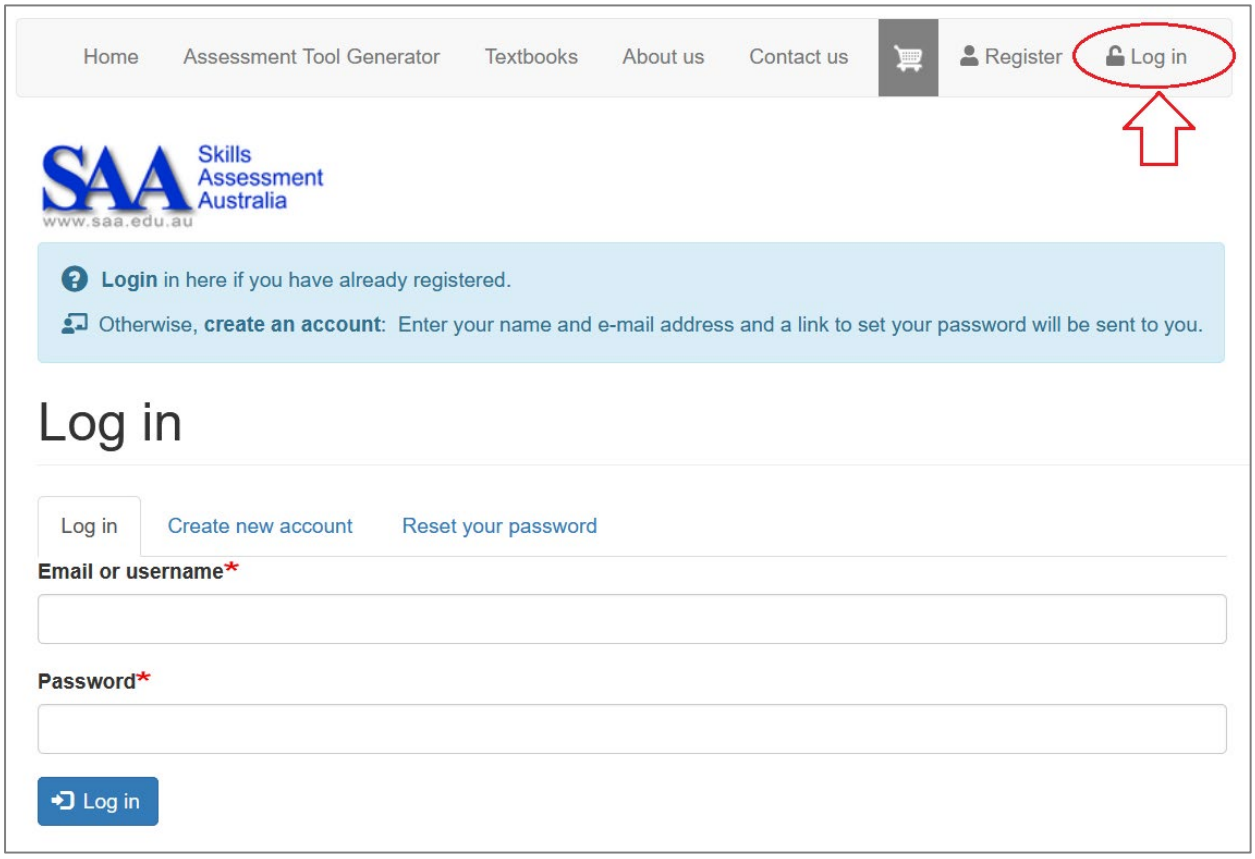
LOGGING IN



ATG login screen

Log in to the ATG from www.saa.edu.au/ATG:

- You can access the ATG with:
  - a guest (free preview) account
  - a student license, or
  - an unrestricted license.
- The final downloadable tool is available as an editable PDF for student licenses, as a Microsoft Word and Excel file for unrestricted licenses, and is unavailable to guest (free) users.
- All licenses are subject to our terms and conditions at www.saa.edu.au/terms.

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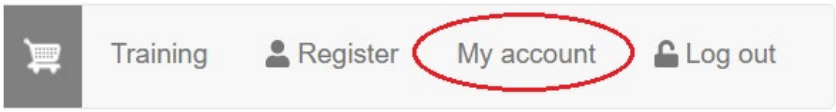
ATG ADMINISTRATION

Invoices

After you have logged in you can download invoices for your purchases from the “My account” menu:



“My account” menu

Security

The following measures exist to prevent student license holders from unauthorised sharing of login details:

- The assessment plan and assessment instruments available to student license holders are downloaded as a PDF file which has editing restrictions enabled and contain a watermark that includes the user’s name. Thus, users who purchase a student license are unable to change their name after they have enrolled.
- The ATG maintains a list of IP addresses that you use to log into your account. If three different IP addresses are used, the ATG automatically disables your access and sends you an email that requires you to reset your password. Thus, users who access the ATG from, say, their work and home PC (i.e., from only two different IP addresses) are not impacted. Repeated instances of sharing IP addresses may result in permanent suspension of your account.

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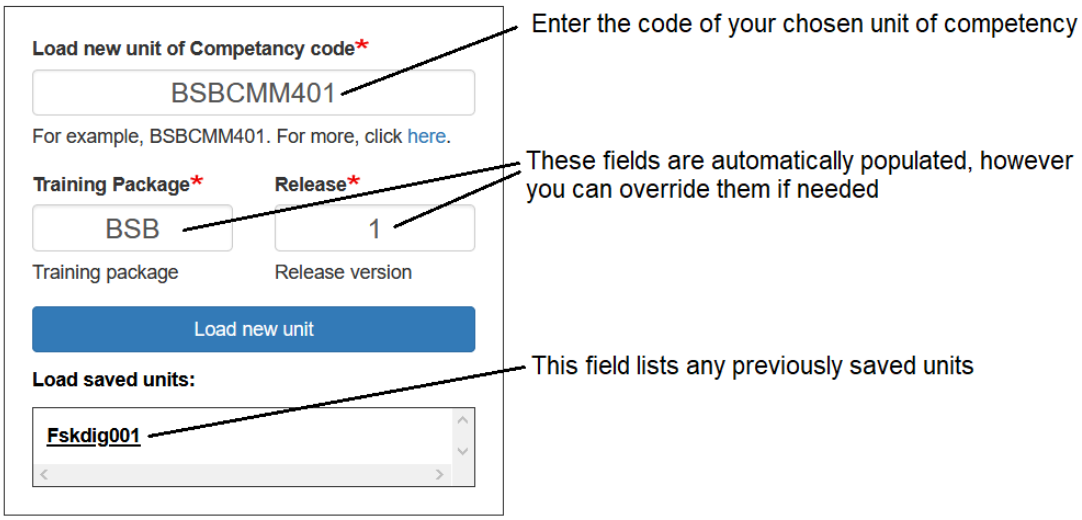
SPECIFYING A UNIT OF COMPETENCY

Go to the main ATG page at www.saa.edu.au/ATG/Training.

You must first specify the code of your selected unit of competency (such as "BSBCMM401") as listed in training.gov.au. Your chosen unit must be in the **new** unit format, i.e., without a letter suffix. (For example, unit BSBCMM401**A** is in the old format and cannot be used.)

The ATG will automatically populate the 'Training package' and 'Release' fields, however, you can override these if needed. For example, if the unit is available as Release 2, you can specify “2” in the “Release” field.



Specifying a unit of competency

Alternatively, if you have previously saved a tool, click on a unit code in the 'Load saved units' section.

Which units?

Your Unit of Competency must be in the new format, i.e., without a letter suffix. For example, unit BSBCMM401**A** is in the old format and cannot be used.

If you are a student studying TAEASS502 *Design and develop assessment tools*, some good (and simple!) examples of suitable units are unit BSBCMM401 (located at https://training.gov.au/Training/Details/BSBCMM401) and those listed in the FSK training package (located at https://training.gov.au/Training/Details/FSK.

The FSK units include:

- FSKDIG001 Use digital technology for short and basic workplace tasks
- FSKDIG002 Use digital technology for routine and simple workplace tasks
- FSKDIG003 Use digital technology for non-routine workplace tasks
- FSKLRG001 Prepare to participate in a learning environment
- FSKLRG002 Identify strategies to respond to short and simple workplace problems
- FSKLRG003 Use short and simple strategies for career planning
- FSKLRG004 Use short and simple strategies for work-related learning
- FSKLRG005 Use strategies to plan simple workplace tasks
- FSKLRG006 Participate in work placement
- FSKLRG007 Use strategies to identify job opportunities
- FSKLRG008 Use simple strategies for work-related learning
- FSKLRG009 Use strategies to respond to routine workplace problems
- FSKLRG010 Use routine strategies for career planning
- FSKLRG011 Use routine strategies for work-related learning

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- FSKLRG012 Apply strategies to plan and manage complex workplace tasks
- FSKLRG013 Apply strategies to respond to complex workplace problems
- FSKLRG014 Manage strategies for career progression
- FSKLRG015 Manage own work-related learning
- FSKLRG016 Use short and simple strategies to organise highly familiar workplace tasks
- FSKLRG017 Identify simple strategies to respond to familiar workplace problems
- FSKLRG018 Develop a plan to organise routine workplace tasks
- FSKNUM001 Use beginning whole number skills up to 100 for work
- FSKNUM002 Use beginning skills related to time and 2D shapes for work
- FSKNUM003 Use whole numbers and halves for work
- FSKNUM004 Use basic and familiar metric measurements for work
- FSKNUM005 Use familiar 2D shapes for work
- FSKNUM006 Use simple and highly familiar spatial information for work
- FSKNUM007 Use simple data for work
- FSKNUM008 Use whole numbers and simple fractions, decimals and percentages for work
- FSKNUM009 Use familiar and simple metric measurements for work
- FSKNUM010 Use common shapes for work
- FSKNUM011 Use familiar and simple spatial information for work
- FSKNUM012 Use familiar and simple data for work
- FSKNUM013 Construct simple tables and graphs for work
- FSKNUM014 Calculate with whole numbers and familiar fractions, decimals and percentages for work
- FSKNUM015 Estimate, measure and calculate with routine metric measurements for work
- FSKNUM016 Interpret, draw and construct routine 2D and 3D shapes for work
- FSKNUM017 Use familiar and routine maps and plans for work
- FSKNUM018 Collect data and construct routine tables and graphs for work
- FSKNUM019 Interpret routine tables, graphs and charts and use information and data for work
- FSKNUM020 Use familiar, routine functions of a calculator for work
- FSKNUM021 Apply an expanding range of arithmetical calculations for work
- FSKNUM022 Use ratios, rates and proportions for complex workplace tasks
- FSKNUM023 Estimate, measure and calculate measurements for work
- FSKNUM024 Use geometry to draw 2D shapes and construct 3D shapes for work
- FSKNUM025 Use detailed maps to plan travel routes for work
- FSKNUM026 Read, interpret and use detailed plans, drawings and diagrams for work
- FSKNUM027 Collect, organise and interpret statistical data for work
- FSKNUM028 Use routine formulas and algebraic expressions for work
- FSKNUM029 Use introductory graphical techniques for work 1
- FSKNUM030 Use common functions of a scientific calculator for work
- FSKNUM031 Apply specialised mathematical calculations for work
- FSKNUM032 Use and calculate with complex measurements for work
- FSKNUM033 Collect, organise and analyse complex statistical data for work
- FSKNUM034 Use and apply concepts of probability for work 1
- FSKNUM035 Use algebraic and graphical techniques to analyse mathematical problems for work
- FSKNUM036 Use trigonometry for work
- FSKNUM037 Use introductory matrices for work
- FSKNUM038 Use introductory vectors
- FSKNUM039 Use introductory calculus for work
- FSKNUM040 Identify and interpret common chance events for work
- FSKNUM041 Use chance and probability calculations for work
- FSKOCM001 Participate in highly familiar spoken exchanges
- FSKOCM002 Engage in short and simple spoken exchanges at work
- FSKOCM003 Participate in familiar spoken interactions at work

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- FSKOCM004 Use oral communication skills to participate in workplace meetings
- FSKOCM005 Use oral communication skills for effective workplace presentations
- FSKOCM006 Use oral communication skills to participate in workplace teams
- FSKOCM007 Interact effectively with others at work
- FSKOCM008 Use oral communication skills to facilitate workplace negotiations
- FSKOCM009 Use oral communication skills to facilitate workplace meetings
- FSKOCM010 Use oral communication skills for complex workplace presentations
- FSKOCM011 Use oral communication skills to facilitate complex workplace team interactions
- FSKOCM012 Use oral communication skills to participate in workplace negotiations
- FSKRDG001 Recognise extremely short and simple workplace signs and symbols
- FSKRDG002 Read and respond to short and simple workplace signs and symbols
- FSKRDG004 Read and respond to short and simple workplace information
- FSKRDG005 Read and respond to simple and familiar workplace procedures
- FSKRDG006 Read and respond to simple informal workplace texts
- FSKRDG007 Read and respond to simple workplace information
- FSKRDG008 Read and respond to information in routine visual and graphic texts
- FSKRDG009 Read and respond to routine standard operating procedures
- FSKRDG010 Read and respond to routine workplace information
- FSKRDG011 Read and respond to complex workplace information
- FSKRDG012 Read and respond to highly complex workplace information
- FSKWTG001 Complete personal details on extremely simple and short workplace forms
- FSKWTG002 Write short and simple workplace formatted texts
- FSKWTG003 Write short and simple workplace information
- FSKWTG005 Write simple workplace formatted texts
- FSKWTG006 Write simple workplace information
- FSKWTG008 Complete routine workplace formatted texts
- FSKWTG009 Write routine workplace texts
- FSKWTG010 Write complex workplace texts
- FSKWTG011 Write highly complex workplace texts

Load the unit

Press the ‘Load new unit” button and the ATG then interprets the relevant assessable items from your selected unit, extracts them and populates the online compliance matrix table:

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PLANNING YOUR TOOL

Why we plan the assessment process

The assessment process is how we confirm that a learner has the skills and knowledge to perform an identified task. When planning the assessment, you should consider how a learner will:

- demonstrate the task
- know what they need to do to complete the task and why, and
- demonstrate they have the ability to perform the tasks in different contexts and environments.

First, consider the components of the training package or accredited course and identify all of the requirements a learner needs to show to demonstrate competency. You must address all requirements of the training package or accredited course. This may mean that multiple and varied assessment methods are required.

When determining the most appropriate assessment method to use, consider:

- Who is your learner cohort? The most appropriate assessment methods depend on the learners with whom you're intending to work. When conducting an assessment, and if possible, consider every learner's individual needs. While you may not know all of a learner's specific needs, when planning and developing the assessment tools, consider the general needs of the cohort. For example, it may be more appropriate to consider a portfolio of evidence for learners who are actively employed and are up-skilling existing competencies.
- Who will collect the evidence? For example, a workplace supervisor would be responsible for collecting all third-party evidence, and the learner would be responsible for collecting a portfolio of evidence. Considering who will collect the evidence guides what instructions are required to accompany the assessment task. Remember, no matter who collects the evidence for assessment, the assessor always determines competence.
- Where will the assessment be conducted? In many instances, the requirements of the training package or accredited course determine the assessment conditions. Some units of competency require assessment to occur in the workplace. Other units recognise that, for reasons of safety, space, or access to equipment and resources, assessment can take place in simulated conditions which represent workplace conditions as closely as possible. Once you understand the requirements of the unit or module and have feedback from industry on the assessment process, you can consider the methods of assessment you use to gather evidence

Compliance matrix

After pressing "Load new unit" or selecting one of your previously saved units, the ATG reads your specified unit of competency from training.gov.au, extracts all assessable items, interprets them, and inserts these into the compliance matrix in the relevant sections. (The completed matrix will form an important part the assessment plan for this unit.)

Each assessable item is also assigned a unique identifier code which are used to correlate assessment instrument content back to the original requirement in this compliance matrix:

- 'Knowledge Evidence' items are labelled KE1, KE2, etc.
- 'Performance Evidence' items are labelled PE1, PE2, etc.
- 'Foundation Skills' items are labelled FS1, FS2, etc.
- 'Assessment Conditions' items are labelled AC1, AC2, etc.
- 'Performance Criterion' items are labelled PC1.1, PC1.2, etc.

However, this numbering convention is optional and, if you choose, you can overwrite these and use any numbering identification you wish.

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Unit of competency criteria				Assessment instruments						
Category	Sub-heading	ID	Assessable item	Question	Observation	Portfolio of documents	Production of an item	Third Party	Noted in plan	Inherent in unit
Elements and Performance Criteria	1 Prepare a presentation	PC 1.1	1.1 Plan and document presentation approach and intended outcomes	☐	☐	☑	☐	☐	☐	☐
		PC 1.2	1.2 Choose presentation strategies, format and delivery methods that match the characteristics of the target audience, location, resources and personnel needed	☐	☐	☑	☐	☐	☐	☐
		PC 1.3	1.3 Select presentation aids, materials and techniques that suit the format and purpose of the presentation, and will enhance audience understanding of key concepts and central ideas	☐	☐	☑	☐	☐	☐	☐
		PC 1.4	1.4 Brief others involved in the presentation on their roles/responsibilities within the presentation	☐	☑	☑	☐	☐	☐	☐
		PC 1.5	1.5 Select techniques to evaluate presentation effectiveness	☐	☑	☑	☐	☐	☐	☐
		PC 2.1	2.1 Explain and discuss desired outcomes of the presentation with the target	☐	☑	☐	☐	☐	☐	☐

ATG compliance matrix (extract)

Verify content load

You should ensure that the matrix table has been populated correctly by comparing the matrix to the original unit of competency listed at training.gov.au/Details/[unit code]. This is because there is no standard definition or protocol relating to the content of units of competency at training.gov.au. Thus, the ATG must read and interpret every line of text within a unit to understand its relationship.

If needed, you can:

- Edit the text directly within the table itself:
- Press Add a row control + to add a row below, or
- Press Delete a row control 🗑 to delete a row

Assign the assessment methods

Assessment instruments						
Question	Observation	Portfolio of documents	Production of an item	Third Party	Noted in plan	Inherent in unit
☐	☐	☑	☐	☐	☐	☐
☐	☐	☑	☐	☐	☐	☐
☐	☐	☑	☐	☐	☐	☐
☐	☑	☑	☐	☐	☐	☐

Assessment method controls

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Select one or more checkboxes to assign your preferred assessment methods / instruments for each assessable item. There are seven assessment methods / instruments from which you can choose:

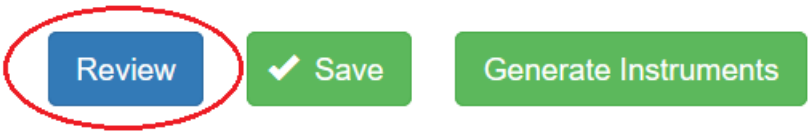
- **Questioning instrument:** This is generally applicable to the assessment of knowledge evidence. Assessment could be by written or oral questioning, conducting interviews and questionnaires
- **Observation instrument:** This is used when an item is best assessed in real time in the workplace or assessed in a simulated off-the-job situation that reflects the workplace.
- **Portfolio of documents instrument:** This is a purposeful collection of work samples of annotated and validated pieces of evidence, compiled by the learner. Evidence could include written documents, photographs, videos or logbooks.
- **Production of an item instrument:** This Structured assessment activities such as reports, displays, work samples, role plays, and presentations
- **Third Party report:** In some cases, an assessor cannot directly gather all the required evidence that supports a competency judgement. In these cases, the evidence may be gathered or reported by other people. For example, in cases where:
  - the presence of an observer may compromise workplace safety, or
  - where work activities involve issues of patient confidentiality and privacy.

  This type of evidence is categorised as supplementary evidence. This includes reports from supervisors, colleagues and/or clients, or testimonials from employers. (Other examples of supplementary evidence are work diaries, or some other evidence of training.)
- **Noted in plan:** It may be unnecessary for an assessment items to be included in assessment instruments, with a better solution being to note and discuss them in the assessment plan, such as assessor qualification requirements. Any item that has this checkbox selected will appear in a dedicated section within the final assessment plan, and you would subsequently provide a description of why it is not implicitly assessed by an assessment instrument.

  Note that although the ATG automatically selects this checkbox for items that are commonly dealt with in this manner, such as assessment conditions, you can override these selections as necessary.
- **Inherent in unit:** Some requirements are self-evident in the assessment process itself and do not require an explicit assessment task, such as a reading or writing foundation skill that is mapped and inherent to several performance criterion.

Check for errors or warnings

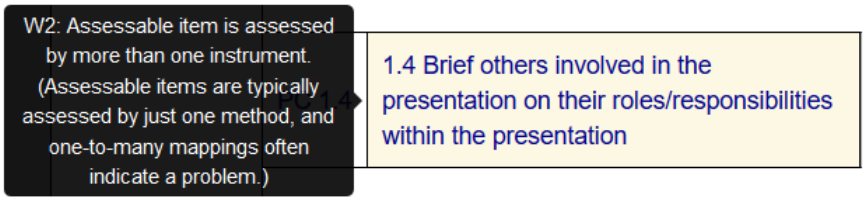
Press the **"Review"** button and the ATG will check your selections against common error and warning rules.



Checking for common errors and warnings

The ATG will review your selection of assessment methods / instruments and flag any issues by highlighting warnings in yellow and errors in red. Move your cursor over each highlighted cell to reveal the error or warning details.

For example:



Context sensitive help for errors and warnings

Note: The ATG does not force you to correct these errors and warnings before generating your assessment instruments.

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The errors and warnings are:

Common errors

- E1: Assessable item has not been assigned an assessment method. (Checkmark is missing.)
  SOLUTION: Select one or more assessment instruments.
- E2: “Performance evidence” item is solely assessed by a third-party report. (Secondary evidence such as this is insufficient for Performance Evidence.)
  SOLUTION: Select a more appropriate assessment method.
- E3: “Oral communications” foundation skill is not assessed by Observation.
  SOLUTION: Select the Observation method.
- E4: “Foundation skill” item is solely assessed by the Questioning instrument.
  SOLUTION: Select another method such as Observation.

Common warnings

- W1: “Knowledge evidence” item is not assessed by a Questioning instrument. (This is irregular.)
  SOLUTION: Select the Questioning method.
- W2: Assessable item is assessed by more than one instrument. (Assessable items are typically assessed by just one method, and one-to-many mappings often indicate a problem.)
  SOLUTION: Select only one assessment method.
- W3: Only one assessment instrument/method is used in your tool. (It is irregular to have less than two methods.)
  SOLUTION: Select a second assessment method for some of the assessable items.
- W4: “Performance evidence” item is solely assessed by a Questioning instrument. (This is irregular.)
  SOLUTION: Select a more appropriate assessment method.
- W5: The “Interact with others” foundation skill is usually assessed by Observation.
  SOLUTION: Select the Observation method.
- W6: Assessment conditions are mapped to an assessment instrument. (It is more usual for this to be noted / discussed in the Assessment Plan.)
  SOLUTION: Select "Noted in plan" instead
- W7: No observation instrument is used in your tool. (This is irregular as most units have observable assessment requirements.)
  SOLUTION: Select an observation assessment method where a skill must be demonstrated and observed by an assessor.
- W8: No questioning instrument is used in your tool. (This is irregular as most units have content that is usually assessed by Questioning, such as Knowledge Evidence requirements.)
  SOLUTION: Select a Questioning assessment method where the knowledge of a subject must be demonstrated.

Complete the rest of the plan

You must also complete and contextualise several additional planning fields. A description of the field and sample text has been provided in each of these areas, which you must now customise:

- **Target group summary:** Provide an overview of your cohort that shall undergo this assessment. We often find that the training and assessment we are planning is targeting a particular group of learners who share at least some characteristics. This does not mean that they are all the same or that they all have the same learning needs. It does mean, however, that there might be a narrow range of learning needs that we need to plan for. Common groups include employees, school leavers, apprentices & trainees, individuals wanting to improve their own skills, etc. Learner characteristics include the level and breadth of experience; special needs, physical or psychological age; motivation for learning; language, literacy and numeracy needs; learning style and preferences; socio-economic background cultural background and needs; level and previous experiences of formal education; skill or competency profile and age. A simple example is provided.
- **Purpose and context/s of the Assessment:** Describe the purpose and context of the assessment. An example is provided; however, you must customise this for your intended cohort.
- **Notes from compliance matrix:** You must add a description as to why there are unit requirements that are not being formally assessed within the instruments, i.e., wherever you checked “Noted in plan” within your compliance matrix. For example, you might cross-reference the assessor requirements from the unit to your RTO's internal processes.

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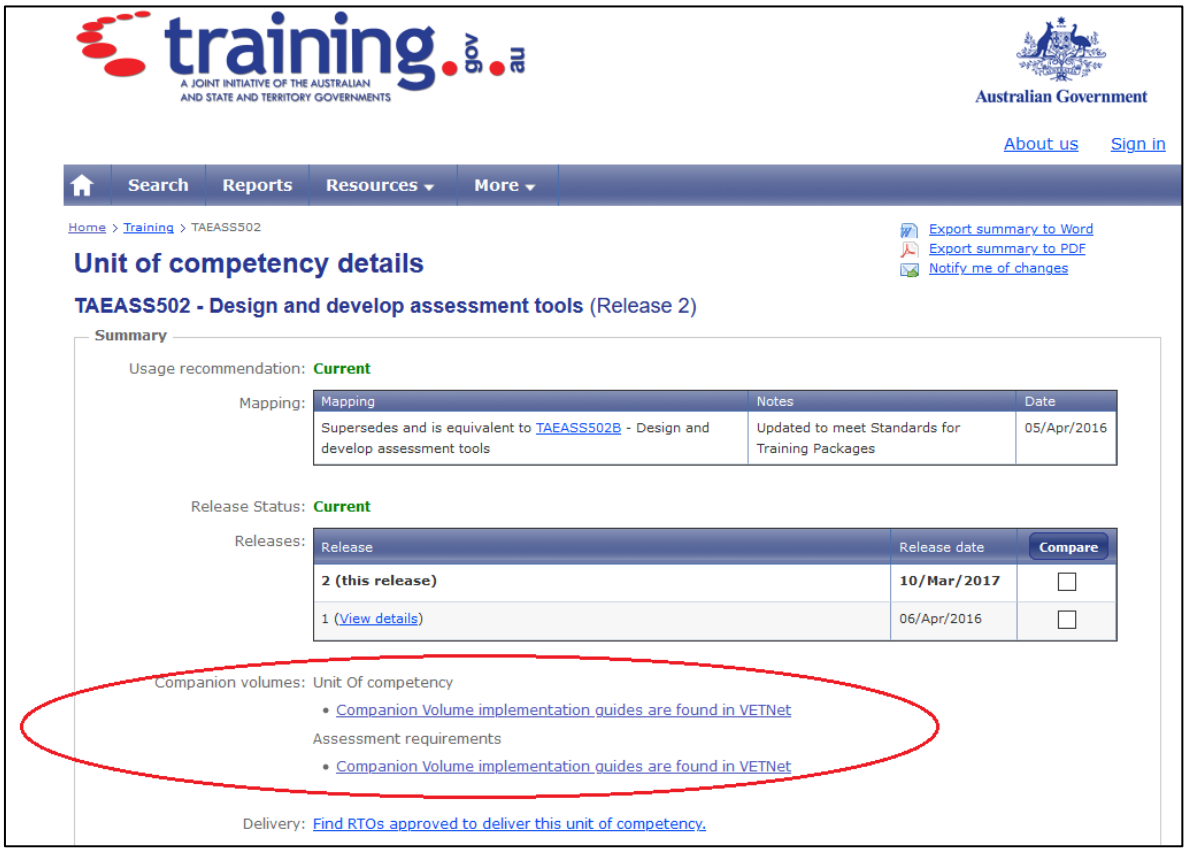
Press the button to load all items that you marked as "Noted in plan" in your compliance matrix, and add a description to each item to explain why it is not being formally assessed by the assessment instruments.

Update notes

- **Assessment methods and instruments:** Describe how and when the assessment instruments will be applied. An example is provided; however, you must customise this for your intended cohort.
- **Applicable industry or workplace standards:** Describe any applicable industry or workplace standards or requirements. If being conducted for corporate clients or specific workplaces, outline the relevant workplace standards for communication. Otherwise state: “No specific documented industry standards”
- **Reasonable adjustments:** Reasonable adjustment is the action you take to enable learners with disabilities to participate in the training and assessment on the same basis as learners without disability. All RTOs are obliged to provide reasonable adjustment to ensure maximum participation of learners with disability. Sample text is provided below, however you must customise this for your intended cohort.
- **Contextualisation guidelines:** Copy and paste any contextualisation guidelines provided by the training package author: You must customise this for your training package by referencing any contextualisation advice listed on training.gov.au, i.e., in the document found by following the link within your unit at training.gov.au which are typically titled "Companion Volume implementation guides". For example:



- **RPL:** You must describe how you will accommodate assessment candidates who claim to have already completed this unit at another RTO, and assessment candidates who claim to possess all competencies but have not formally completed this unit. Sample text is provided within the plan.
- **Assessor resources:** At minimum, you should include all associated instruments and other resources specified in the Assessment Conditions of the unit, and any other assessment resources needed to administer the assessment. Press the button to automatically load all instruments you selected in your compliance matrix:

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- **Candidate resources:** List all resources the assessment candidate will need, such as copies of the assessment instruments and assessment resources. You must customise this for your intended cohort. Press the button to automatically load all instruments you selected in your compliance matrix:

- **Location:** Select where you intend the assessment to occur, i.e., one or more of Workplace, Classroom, Simulated workplace, Online or Other.
- **Timing:** Describe when assessment is to occur, how long it is likely to require, and the required order of completion of each assessment instrument. For example: "This assessment task should be given at the end of the training. The tasks typically take 15 minutes each to complete."
- **Review, evaluation and approval process:** Describe the process for gaining stakeholder review, evaluation and approval. Stakeholders might include your RTO academic manager, client manager, industry bodies, etc. Sample text has been provided below however you must customise this for your particular circumstances.

Saving your work

Press the 'Save' button at the bottom of your screen to save the work you have done in your compliance matrix.

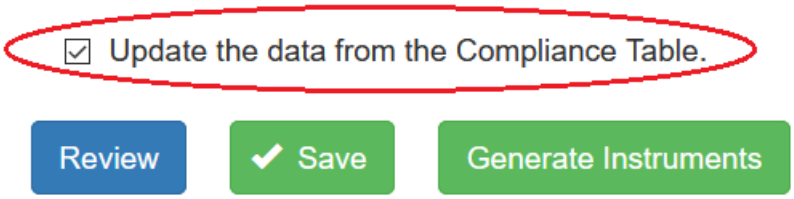
Save your assessment compliance matrix

Generating the tool

Press the 'Generate instruments button at the bottom of your screen and the ATG will generate up to five online forms (based upon your checkbox selections in the compliance table above). Each online form is a component of the associated final assessment instrument.

Generate your assessment instruments

If you have already generated, modified and saved assessment instruments (i.e., by pressing "Generate instruments") and wish to go back and edit any of the fields in the assessment planning section, the following checkbox control allows you to prevent the ATG from overwriting your previously saved instruments.



Prevent the ATG from overwriting previously saved instruments

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ASSESSMENT INSTRUMENTS

Depending on the assessment methods that you selected in the compliance matrix, you will now be presented with the checklist items from one or more assessment instruments to modify.

Follow the instructions in each of the assessment instruments. This configures the 'checklist items' section of each of your selected assessment instruments and forms a component of the final assessment instruments.

In addition to directly editing the text, there are several controls you may use:

Move item up

Move item down

Add a row below

Delete row

Show Unit Show unit of competency. This is particularly useful to review the "Range Statement" available in any listed superseded unit if it is in the old unit format. (New format units no longer have range statements.)

Video Help Displays video help on how to use this compliance matrix

Save Saves your form

Download (PDF) Download your full assessment tool and customise it for your intended cohort. The format of the downloaded tool depends on your license:

- Student licenses: Your assessment plan is available as a PDF file with restricted editing enabled.
- Unrestricted license: Your assessment plan is available as a MS word document and an Excel file with unrestricted editing.
- Guest / trial users: Only a sample report is available for download.

Observation / Production / Portfolio instruments

All of your selected instruments are pre-populated with all assessment checklist tasks. You must now complete and contextualise several fields:

- Instructions to candidate
- Instructions to assessor, and
- Evidence required and decision-making rules.

A description of each field and sample text has been provided in each of these areas.

Reorder and merge tasks: You must reorder the tasks (if needed) and/or combine any requirements that will be satisfied by the same task description. For example, unit BSBCMM401 *Make a presentation* has the following items that could be merged or grouped together:

- Performance Criterion 2.2: *Use presentation aids, materials and examples to support target audience understanding of key concepts and central ideas*
- Performance evidence item 4: *[use] aids and materials to support the presentation*

In this example, these two items would be combined in the ATG form by adding the text in red below, and deleting the entire PE4 column:

PC 2.2 PE 4	Did the candidate use presentation aids (including, at minimum, handouts and MS PowerPoint), materials and examples to support target audience understanding of key concepts and central ideas?

Change language format: Change the unit content from a specification to a checklist observation item. For example, in the above example, PC2.2 was changed by adding this text in red: "*Did the candidate*

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use presentation aids, materials and examples to support target audience understanding of key concepts and central ideas?"

Contextualise: Contextualise the tasks to ensure they are relevant to your intended cohort. For example, if a unit required the demonstration of use of "word processing software" and your cohort primarily uses Microsoft Word, your assessment task might replace "word processing software" with "Microsoft Word".

Make it *SMART*: Rewrite any item that is not SMART (i.e., Specific, Measurable, Achievable, Realistic, Time-based) – particularly Specific and Measurable. Any vague or 'soft' references must be re-written with specific examples. For example, you might re-write a unit item such as *"Use presentation aids, materials and examples to support target audience understanding of key concepts and central ideas"* with:

A. *During the presentation did the candidate use at least two presentation aids including, at minimum, a PowerPoint presentation and paper copy of the slides?* (Note that at least two must be specified as the requirement is for 'aid**s'** – plural!)

B. *During the presentation did the candidate use materials including, at minimum, paper and pens?* (Note that at least two must be specified as the requirement is for 'material**s'** – plural!)

C. *During the presentation did the candidate provide examples including, at minimum, two websites?"* (Note that at least two must be specified as the requirement is for 'example**s'** – plural!)

You may also find suitable examples of this in the 'Range Statement' which may be available from the unit's superseded unit in the old format. (Note: Range statements are no longer included in the new format units.)

Where to find range statements

For example, "presentation strategies" are specified in unit BSBCMM401, and the hyperlink to the superseded unit (as shown above) reveals the following range statement (from www.training.gov.au/Training/Details/BSBCMM401**A)**:

Presentation strategies may involve:

- *case studies*
- *demonstration*
- *discussion*
- *group and/or pair work*
- *oral presentations*
- *questioning*
- *simulations and role-play*

…etc…

Questioning instrument

You must make the following changes to this extract from the Questioning instrument:

- Re-order the content items (if needed) so that they are logically grouped together.
- Combine any items that will require the same question.

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- Rewrite each of the requirements into questions. For example, a Knowledge Evidence requirement of "Knowledge of traffic lights" might be rewritten into question/s that ask the candidate to correctly interpret a red, orange, and green traffic light.
- Where possible, contextualise the questions to ensure they are relevant to your intended cohort.
- Provide a sample answer (or marker's guidance) for each question. For example, the model answer to the question that asks the candidate to interpret a red, orange and green traffic light would be "stop, beware and go", respectively.
- Ensure that each question is appropriate to the level of the unit. That is, a Certificate III level unit requires the candidate to demonstrate a much deeper understanding of the topic than that of a similarly worded Certificate I requirement."

Third party reports

You must contextualise the observable items to ensure they are relevant to the workplace. Your instructions must also be SMART – especially Specific and Measurable. If a 'Range Statement' is available, this may assist you in contextualising the task instructions.

About third party reports

You must ensure the assessment processes lead to the collection of quality evidence. You must provide sufficient guidance to both assessors and the other party by:

- Providing assessors with comprehensive guidance about selecting the best person/s to collect evidence: The appropriate person to observe or report on the performance of the learner is someone who is in a position to make a valid comment on the learner's performance, for example, a line manager.
- Providing quality materials for collecting evidence: These materials must seek/solicit/allow for feedback that is directly related to the relevant unit(s) of competency or module on the learner's performance, without necessarily replicating the performance criteria
- Providing the other party with comprehensive information about their role in the evidence-gathering process: This includes providing clear guidance and instruction on when, how, how often and over what period of time the evidence is to be collected. The materials must explain the form in which the evidence is to be collected—for example, a structured supervisor report or an observation checklist that clearly identifies what is observed or performed.
- Obtaining confirmation that the other party understands their role in the process: This should include confirmation that the other party has agreed to participate in the evidence-gathering process and that they understand when and how to collect evidence.
- 'Interpreting' training package and accredited course information to be relevant to the other party: Units of competency and modules describe work outcomes. Each of these units/modules describes:
  - a specific work activity
  - the conditions under which this work activity is conducted, and
  - the evidence that may/must be gathered in order to determine whether the activity is being performed in a competent manner.
- Training package information is written to guide assessors and the language is sometimes

Setting requirements for assessors in confirming the authenticity of evidence provided by a candidate: That is, setting requirements for assessors to confirm that evidence is the candidate's own work. Where another party is involved in the collection of evidence, there should be instructions for assessors on how to verify this evidence to ensure it is a true and accurate reflection of the candidate's skills.

General guidance on finalising your instruments

An assessment tool comprises a number of components which ensure assessment is conducted in a manner that is fair, flexible, valid and reliable. These components include:

- Context and conditions of assessment
- Task to be administered to the student
- An outline of evidence to be gathered from the candidate
- Evidence criteria used to judge the quality of performance
- Administration, recording and reporting requirements

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Context and conditions of assessment

The context and conditions of assessment clarify the target group and purpose of the tool and is recorded in instructions for the assessor, the learner and any contributing third party. The instructions should be appropriate for the reader. The instructions can be included with the assessment instrument or attached as a separate document.

The context and conditions of assessment considers those characteristics of the learner cohort that may impact on performance. For example, an assessment tool could be developed to cater for particular language, literacy and numeracy requirements; a learner's workplace experience; or other learner needs that require reasonable adjustment. The context of the assessment may also take into account assessments already completed, and the competencies demonstrated in these assessments.

By looking at context you can consider the conditions under which evidence for assessment must be gathered. Training package requirements and industry consultation may identify conditions to be considered when conducting assessment such as:

- equipment or material requirements
- contingencies
- specifications
- physical conditions
- relationships with team members and supervisors
- relationships with clients/customers
- timeframes for completion.

Any conditions should be clarified in the instructions to ensure consistency in the application of the assessment.

Tasks to be administered to the student

The instructions you provide to the student should outline the tasks through which a learner can demonstrate competency. These instructions will prompt the learner to say, do, write or create something.

The learner clearly needs to understand the tasks. If the learner reviews the tasks and needs to clarify the instructions or ask further questions, then the information provided is not valid or reliable. Well-designed assessment instructions minimise the variation between assessors.

An outline of the evidence to be gathered from the candidate

As well as informing the learner of what they will do in the assessment, you will need to explain to them what evidence they need to provide in response to the tasks.

If a learner is required to submit evidence, the instructions must include guidance on:

- what to include as evidence
- how to submit the evidence, and
- how to present the evidence.

If a learner is observed by an assessor, the outline of the evidence should clarify what the assessor will look for during the observation. An 'observation checklist' could be appropriate in this instance. You should also communicate to the learner if the observation is being recorded by audio or video.

Evidence criteria used to judge the quality of performance

The evidence criteria are also referred to as the 'assessment decision-making rules'. These are the rules used to make judgements about whether competency has been achieved. Evidence criteria are used by an assessor to ensure consistent outcomes when:

- checking evidence quality (i.e. the rules of evidence)
- judging how well the learner performed according to the standard expected, and
- collating evidence from multiple sources to make an overall judgement.

The evidence criteria ensure the intent of the assessment tool is met and that the learner is able to demonstrate they have valid, sufficient, authentic and current skills and knowledge relevant to the unit. The criteria confirms the evidence provided by a learner:

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- directly relates to the competency being assessed
- is enough to allow the assessor to make a valid judgement
- is the learner's own work, and
- shows currency of the skills and knowledge required.

The evidence criteria should not be open to interpretation. The criteria must provide sufficient clarity for assessment judgements to be consistent across a range of assessors and points in time. If your RTO has only one assessor, you must still develop evidence criteria to ensure consistency in that assessor's judgements.

Administration, recording and reporting requirements

You must securely retain—and produce in full if required at audit—all completed student assessment items for each learner for a period of six months from the date on which the judgement of competence for the learner was made. You must also retain sufficient data to be able to reissue AQF certification documentation for a period of 30 years.

In recording evidence of assessment, assessors and learners need to be informed of the administration, recording and reporting requirements related to that assessment tool. Where possible retain the actual piece(s) of work completed by the learner. The completed evidence criteria may be sufficient where it is not possible to retain the student's actual work. However, you must ensure that the retained evidence has enough detail to demonstrate the judgement made of the learner's performance against the standard required.

Each assessment tool should require an assessor to provide feedback to the learner, both where competency has been demonstrated and where further evidence is required. Providing feedback shows fairness in the assessment process and allows a learner to understand why a result was awarded.

Every RTO has its own internal processes and procedures to manage administration, recording and reporting requirements. Your assessment tools must be designed to comply with these processes

Export your tool

You can then export your assessment plan and assessment instruments:

- For guests / unregistered uses: Export / download of the assessment tool is not available, although a sample ("dummy") report is available to download.
- For student licenses: Download the PDF file which includes a security watermark "Licensed to and generated by [Client Name].
- For full licenses: The assessment tool is downloaded as a MS Word and Excel file with unrestricted editing.

For licensed users., one of these two download controls will appear after you press "Save"

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