

ASSESSOR GUIDE

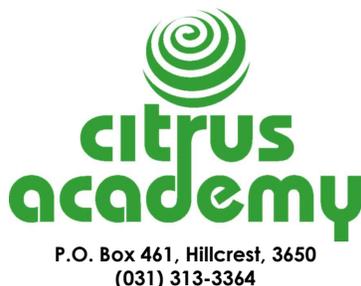
Production Management



Title:	Develop a Production and Strategic Plan for a Farming Business						
Applied Title:	Develop a Production and Strategic Plan for a Subtropical fruit Farming Business						
Field:	Agriculture and Nature Conservation						
Sub-Field:	Primary Agriculture						
SETA (SGB):	AgriSETA						
Skills Area:	Production Management						
Context:	Subtropical fruit Production						
US No:	116426	Level:	5	Credits:	10	Notional Hours:	100
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NQF Level **5**

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Directions

Please Note: There is a separate assessment guide for the learner. The learner must use this guide to prepare himself / herself for the assessment.

This assessment guide contains all necessary activities and instructions that will enable the assessor and learner to gather evidence of the learner's competence as required by the unit standard. This guide was designed to be used by a trained and accredited assessor who is registered to assess this specific unit standard as per the requirements of the AgriSETA ETQA.

Prior to the delivery of the program the facilitator and assessor must familiarise themselves with content of this guide, as well as the content of the assessment guide for learners.

The assessor, facilitator and learner must plan the assessment process together, in order to offer the learner the maximum support, and the opportunity to reflect competence.

The policies and procedures that are applicable during the execution of this assessment are available on the website of the Citrus Academy, contained in a document named Policies and Procedures for Assessment, and must be strictly adhered to. The assessor must familiarise himself with this document before proceeding.

This guide provides step-by-step instructions for the assessment process of:

US No:	116426	Level:	5	Credits:	10
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The step-by-step instructions agree and are conducted in concert with the steps described in the learner assessment guide. The steps are as follows:

<i>Step</i>	<i>Description</i>	<i>Timeframe</i>
1	Learner assessment contract	Before delivery of program
2	Learner Declaration of Authenticity	Before delivery of program
3	Diagnostic Assessment of Learning Assumed to be in Place	Before delivery of program
4	Assessment Plan for Gathering of Evidence	Before delivery of program
5	Learner Formative Assessment Activities	During delivery of program, assessment after delivery of program
6	Summative Learner Presentation	After delivery of program
7	Integrated Summative Assessment Tool	After delivery of program
8	Re-assessment Procedures	After completion of assessment
9	Documentation	After completion of assessment
10	Administration and Completion of Portfolio of Evidence	After completion of assessment



Step 1

Pre-Assessment Briefing and Checklist

A pre-assessment briefing for learners is held before the delivery of the program. Use the checklist below to ensure that all these points are addressed and discussed with the learners.

Pre-Assessment Briefing Checklist		
	√	X
Organise resources – people, equipment, venue, etc.		
Explain the purpose of the assessment		
Discuss the standards or criteria to be used		
Discuss assessment roles and accountabilities		
Decide on assessment venues		
Negotiate evidence required, and where or how this evidence may be gathered		
Explain the methods of assessment that will be used during the gathering and summing up of evidence		
Negotiate the date of submission for the activity workbook and the date for the summative assessment		
Discuss resources required for the assessment e.g. equipment, materials, etc.		
Explain the procedure if the learner is found to be not yet competent		
Explain the appeal and review procedures		
Identify any potential learning barriers and negotiate strategies to overcome these		
Complete and sign the assessment plan with the learner		

The learner and assessors must sign the **Learner Contract** in the learner assessment guide.



Step 2

Learner Declaration of Authenticity

The learner is requested to complete and sign the Declaration of Authenticity in the learner assessment guide. This should be checked and co-signed by the assessor.

The format is as reflected in the learner assessment guide.

Step 3

Diagnostic Assessment of Learning Assumed to Be in Place

In the learner assessment guide, the learner is asked to indicate whether they have completed the learning assumed to be in place as prescribed by the unit standard.

The assessor must guide the learners through this step, explaining in detail the content of the mentioned learning areas, because names of learning programs do not always agree with the names of the unit standards, and learners might indicate the incorrect information.

If learners indicate that they have not yet completed the mentioned unit standards, the assessor should prescribe an action plan to allow the learner to obtain the skills required by recommending additional training, competence portfolios, or the relevant RPL assessment for the given unit standards.

The format is as reflected in the assessment guide for learners. Please read it and familiarise yourself with its content.

Step 4

Assessment Plan for Gathering of Evidence

A pro-forma assessment plan for this unit standard has been drafted in the learner assessment guide. Explain the plan to the learner and complete the dates and signatures as indicated.

The format for the assessment plan is as reflected in the assessment guide for learners. Please read it and familiarise yourself with its content. Make a note of the dates agreed upon in the table provided below.

Learner and Assessor Assessment Plan		
Unit Standard	Develop a Production and Strategic Plan for a Farming Business	
Registration Number	116426	
<i>Step</i>	<i>Description</i>	<i>Completion / Submission Date</i>
Step 5	Learner Formative Assessment Activities	
Step 6	Summative Learner Presentation	
Step 7	Integrated Summative Assessment	
Step 8	Re-Assessment Procedures	
Step 9	Documentation	
Step 10	Administration and Completion of Portfolio of Evidence	

Step 5

Learner Formative Assessment Activities

The learner assessment guide contains comprehensive activities and worksheets that the learner must complete during the delivery of the learning program. It is imperative that these activities be completed as part of the learning process in order to give the learner the opportunity to develop the skills, knowledge and attitudes that are required for competence.

Learners must complete all the activities in the workbook.

Learners must be encouraged to take control of their learning by indicating areas in the workbook where they experience difficulty.

The learner hands in the learner assessment guide to the assessor or the facilitator, only if the facilitator is a subject matter expert, for the assessment of the formative assessment activities. The assessment of these activities must be done according to the prescribed benchmarks and according to the following marking matrix.

The learner should not move on to the next step before this step has been completed and learners show sufficient capacity and readiness for summative assessment. If problems areas are identified, the learner should be guided with a developmental action plan, which is documented separately and signed by the learner, the facilitator and the assessor.

Model answers are provided below.

Activity 1 – Research and Report	
Perform a media search and draft a report on the current state of the sub-tropical fruit industry in South Africa, with detailed recommendations for emerging farmers who would wish to get involved in commercial sub-tropical fruit production for export purposes.	
Make sure that you gather and report on information as follows:	
<ul style="list-style-type: none"> • Discuss current market trends in South Africa and globally related to the sub-tropical fruit industry. • Discuss historical, current and predicted weather patterns and its bearing on commercial sub-tropical fruit production. • Discuss foreign exchange fluctuations and its bearing on commercial sub-tropical fruit production. • Give an overview of the current business trends in South Africa and the sub-tropical fruit industry, detailing trading, health, legal, nutritional, personnel and cost related information. • Give a detailed overview of your information sources, their relevance and accuracy, and explain what bearing the information gleaned from each had on your report and recommendations. 	
The report must be a minimum of 5 pages and must be attached to this learner guide to form part of your portfolio of evidence.	
Model answers will vary according to learner context and currency of information	
Marking Matrix:	
The benchmark for this activity is 80%, allocate points as follows:	
Clear evidence that a media search was performed (including reference list).	5%
Perform a media search and draft a report on the current state of the sub-tropical fruit industry in South Africa, with detailed recommendations for emerging farmers	

who would wish to get involved in commercial sub-tropical fruit production for export purposes.	
• Discuss current market trends in South Africa and globally related to the sub-tropical fruit industry.	20%
• Discuss historical, current and predicted weather patterns and its bearing on commercial sub-tropical fruit production.	20%
• Discuss foreign exchange fluctuations and its bearing on commercial sub-tropical fruit production.	20%
• Give an overview of the current business trends in South Africa and the sub-tropical fruit industry, detailing trading, health, legal, nutritional, personnel and cost related information.	20%
• Give a detailed overview of your information sources, their relevance and accuracy, and explain what bearing the information gleaned from each had on your report and recommendations.	10%
The report must be a minimum of 5 pages and must be attached to this learner guide to form part of the portfolio of evidence.	5%

Activity 2 – Research and Report

Research and develop a report containing recommendations in the form of a practical Profit Improvement Plan for the farm where you are completing your practical learning.

Ensure that your PIP includes the following:

- A detailed analysis of current market research related to the sub-tropical fruit industry of South Africa, and its potential markets.
- Give an overview of the current market in which the sub-tropical fruit farm operates and make recommendations for at least one other potential target market.
- Explain how the current target market and marketing strategy affects the production processes on the sub-tropical fruit farm, and make recommendations regarding possible improvements in the marketing strategy, the production plan or both that could potentially enhance the profitability of the farm.
- Analyse current quality and quantity of crop produced versus price considerations and market demands, and make recommendations.
- Recommend improved short-term, medium-term and long-term strategies and activities for the marketing mix of the farm.
- Recommend improved short-term, medium-term and long-term strategies and activities for the production planning of the farm.
- Draft detailed action plans with deliverables and time frames for corrective actions in the production plan to improve productivity, production yields and ultimately profitability of the enterprise.

The report must be a minimum of 5 pages and must be attached to this learner guide to form part of your portfolio of evidence.

Model answers will vary according to learner context and currency of information

Marking Matrix:

The benchmark for this activity is 80%, allocate points as follows:

Clear evidence that a research was performed (including reference list)	5%
Research and develop a report containing recommendations in the form of a practical Profit Improvement Plan for the farm where you are completing your	
Ensure that the PIP includes the following:	
• A detailed analysis of current market research related to the sub-tropical fruit industry of South Africa and its potential markets.	20%

<ul style="list-style-type: none"> • A detailed analysis of current market research related to the sub-tropical fruit industry of South Africa, and its potential markets. 	20%
<ul style="list-style-type: none"> • Give an overview of the current market in which the sub-tropical fruit farm operates and make recommendations for at least one other potential target market. 	10%
<ul style="list-style-type: none"> • Explain how the current target market and marketing strategy affects the production processes on the sub-tropical fruit farm, and make recommendations regarding possible improvements in the marketing strategy, the production plan or both that could potentially enhance the profitability of the farm. 	20%
<ul style="list-style-type: none"> • Analyse current quality and quantity of crop produced versus price considerations and market demands, and make recommendations. 	10%
<ul style="list-style-type: none"> • Recommend improved short-term, medium-term and long-term strategies and activities for the marketing mix of the farm. 	10%
<ul style="list-style-type: none"> • Recommend improved short-term, medium-term and long-term strategies and activities for the production planning of the farm. 	10%
<ul style="list-style-type: none"> • Draft detailed action plans with deliverables and time frames for corrective actions in the production plan to improve productivity, production yields and ultimately profitability of the enterprise. 	15%

Activity 3 – Presentation

Deliver a multimedia presentation to the class or assessor about the following subject:

“A timeline analysis of how technology has influenced sub-tropical fruit production in South Africa over the last 250 years”

Include the following in your presentation:

- A detailed time line with progressive historical information surrounding the use of machinery, equipment and tools used in commercial sub-tropical fruit production.
- Give a specific overview of the more recent impact of advanced technology in terms of communications, information technology and advances in financial technology, and the impact it has had on the sub-tropical fruit industry in South Africa.
- Give an overview of current machinery and equipment utilised on sub-tropical fruit farms in South Africa as compared with international machinery and equipment use.
- Discuss the capital expenditure that would be required to introduce, operate and maintain the most advanced technological machinery, tools and equipment available.

Give additional handouts and information to the audience, in the form of:

- A detailed annual maintenance plan for the machinery and equipment recommended in your presentation.
- Detailed leaflets, brochures and information regarding current purchase prices, lease or hiring options, maintenance plans and recommendations with regards the most cost effective way to introduce such machines, equipment and technology on a sub-tropical fruit farm.

Include a hard copy of your presentation in your portfolio of evidence, together with the handouts and information listed above.

Model answers will vary according to learner context and currency of information

Marking Matrix:

The benchmark for this activity is 80%, allocate points as follows

Clear evidence provided of multimedia presentation including posters, PowerPoint	5%
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show, key notes and / or handouts.	
Clear evidence that a media search was performed (including reference list)	5%
The topic: "A timeline analysis of how technology has influenced sub-tropical fruit production in South Africa over the last 250 years since the advent of the first sub-tropical fruit production in 1654", clearly addressed.	5%
Included in the presentation:	
<ul style="list-style-type: none"> • A detailed time line with progressive historical information surrounding the use of machinery, equipment and tools used in commercial sub-tropical fruit production. 	20%
<ul style="list-style-type: none"> • Give a specific overview of the more recent impact of advanced technology in terms of communications, information technology and advances in financial technology, and the impact it has had on the sub-tropical fruit industry in South Africa. 	20%
<ul style="list-style-type: none"> • Give an overview of current machinery and equipment utilised on sub-tropical fruit farms in South Africa as compared with international machinery and equipment use. 	10%
<ul style="list-style-type: none"> • Discuss the capital expenditure that would be required to introduce, operate and maintain the most advanced technological machinery, tools and equipment available. 	10%
Additional handouts and information to the audience, in the form of:	
<ul style="list-style-type: none"> • A detailed annual maintenance plan for the machinery and equipment recommended in your presentation. 	10%
<ul style="list-style-type: none"> • Detailed leaflets, brochures and information regarding current purchase prices, lease or hiring options, maintenance plans and recommendations with regards the most cost effective way to introduce such machines, equipment and technology on a sub-tropical fruit farm. 	15%

Activity 4 – Group Brainstorm	
Brainstorm in groups and draft a pictogram detailing the components and planning processes needed to draft a successful production plan. Include the following:	
<ul style="list-style-type: none"> • All the aspects of: <ul style="list-style-type: none"> ○ Inputs ○ Resources ○ Processes ○ Procedures ○ Markets ○ Technology • Possible legal considerations. 	
Include in the pictogram the basic outline of such a production plan. Clearly indicate timeframes, critical planning points, milestones and feedback sessions in the pictogram.	
Include the pictogram, including key notes, in your portfolio of evidence.	
Model answers will vary according to learner context and currency of information	
Marking Matrix:	
The benchmark for this activity is 80%, allocate points as follows	
Clear evidence provided of multimedia presentation including posters, PowerPoint show, key notes and / or handouts.	5%
A pictogram is drafted that clearly follows the basic outline of a sub-tropical fruit production plan.	5%

A pictogram is drafted that clearly follows the basic outline of a sub-tropical fruit production plan.	5%
The pictogram includes each of the following elements:	
• Inputs	5%
• Resources	5%
• Processes	5%
• Procedures	5%
• Markets	5%
• Technology	5%
• Possible legal considerations.	5%
Timeframes, critical planning points, milestones and feedback sessions in the pictogram for each element.	45%

Activity 5 – Group Brainstorm

Firstly, draft a SWOT analysis for the farm where you are completing your practical learning, detailing all aspects needed for the drafting, implementation and management of a strategic plan.

Secondly, brainstorm in groups and draft a pictogram detailing the components and planning processes needed to draft a strategic plan. Include the following:

- Planning:
 - Long-term planning of the production process
 - The identification of opportunities and threats with in the agricultural processing environment
 - Future changes that may be required in agricultural business
- Environment:
 - Local, national and international activities
- Developments:
 - In the markets
 - Political, social-economic developments at a micro-, meso- and macro level
- Legal considerations

Include the pictogram, including key notes, in your portfolio of evidence.

Model answers will vary according to learner context and currency of information

Marking Matrix:	
SWOT analysis for the farm detailing all aspects needed for the drafting.	40%
A pictogram detailing the components and planning processes needed to draft a	5%
• Planning:	
○ Long-term planning of the production process	5%
○ The identification of opportunities and threats with in the agricultural	5%
○ Future changes that may be required in agricultural business	5%
• Environment:	
○ Local, national and international activities	10%

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Skills Area: Production Management

Level: 5

Unit Standard: 116426

○ Local, national and international activities	10%
• Developments:	
○ In the markets	5%
○ Political, social-economic developments at a micro-, meso- and macro level	15%
• Legal considerations	10%

Step 6

Summative Learner Presentation

Before the summative task is undertaken, the learner must be reminded of what is expected from him / her in terms of summative and reflexive competence. Read and explain to the learner this section in the learner assessment guide. The learner and assessor must sign off this section to acknowledge that this step was completed.

- Use the planning and questioning format below to help you collect evidence for foundational and embedded knowledge as prescribed by the outcomes of the unit standards.
- Provide the questions as listed to the learners as a guide.
- Ensure that you apply the exact same methodology for each learner in order to ensure that VACS principles are adhered to.
- The benchmark for learner competence is an 85% overall test score.
- Only a suitably qualified and registered assessor who is ALSO a subject matter expert in this specific field can mark this assessment tool for learner assessment.
- If no such a person can be found to assess the learner, then it is advised that a qualified assessor consults with the appropriate subject matter expert prior to the assessment in order to establish key points for competence and / or uses model answers as supplied by a subject matter expert to allocate marks. The subject matter expert should be consulted for any answers that the assessor might have queries on.
- Use a header in the following format for each test paper:

Unit Standard:	116426	NQF Level:	5
Learner Name			

- The assessor should use the questions below as a marking matrix and to gather evidence and to check for completeness.

A strategic plan for the sub-tropical fruit farm in question	15%
A production plan linked to the strategic plan listed above	15%
Motivate your plans with a detailed market analysis report for the sub-tropical fruit industry in South Africa.	20%
Research and make recommendations in the form of a practical Profit Improvement Plan.	10%
A detailed SWOT analysis with recommendations of turning threats into opportunities and weaknesses into strengths.	10%
Research and recommendations with actual quotes, budgets, options and maintenance plans for new technology, tools and equipment, that may improve the productivity and / or profitability of the sub-tropical fruit farm.	20%
Completeness and Presentation Skill	10%

Step 7

Integrated Summative Assessment Tool

One assessment tool is provided in this step, being:

1. Attitudes and Attributes Assessment Tool

This assessment tool has been drafted in its entirety and follows below. It must be copied and completed for every learner in the same manner and according to the same procedure.

Learners must not be given these tools in preparation for summative assessment. This corresponding step in the Learner Assessment Guide is a direct reflection of these tools and is drafted in a format that is appropriate to the learner's level of language competence.

1. **Attitudes and Attributes Assessment Tool**

- Use this rating scale to judge the learner's CCFO competence according to the unit standard.
- The learner's entire performance and all the stages of learning, as well as all gathered evidence must be considered for this section.
- It is advised that the assessor consult with facilitators, mentors, coaches and supervisors in order to ensure that an objective rating is allocated.
- A rating between 1 and 5 should be given, as follows:

<i>Rating</i>	<i>Description</i>
1	No evidence can be found
2	The evidence found is weak and this is still a major development area for the learner
3	The evidence found meets the average expectation for a learner on this level
4	The evidence found is of a high quality and exceeds the average standard expected
5	The evidence found is outstanding and the learner attitudes and traits are very well developed

- Learner must be given constructive feedback on each rating.
- Ensure that you apply the exact same methodology for each learner in order to ensure that VACS principles are adhered to.
- The benchmark for learner competence in this tool is 3:5 in EVERY CCFO.

At the end of this step, an assessment feedback form is provided which must be completed and signed by the assessor, learner and moderator, where applicable.



Attitudes and Attributes Assessment Tool	
Use the following rating table in this assessment:	
Rating	Description
1	No evidence can be found
2	The evidence found is weak and this is still a major development area for the learner
3	The evidence found meets the average expectation for a learner on this level
4	The evidence found is of a high quality and exceeds the average standard expected
5	The evidence found is outstanding and the learner attitudes and traits are very well developed
CCFO Criteria	
CCFO Criteria	Rating
Identifying – The learner can identify problems and deficiencies correctly.	
Working in a Team – The learner is able to work well as member of a team.	
Organising – The learner works in an organised and systematic way whilst performing all tasks and tests.	
Communicating – The learner is able to communicate his or her knowledge orally and in writing, in a way that shows what knowledge he or she has gained.	
Demonstrating – The learner is able to show and perform the tasks required correctly.	
Contributing – The learner is able to link the knowledge, skills and attitudes that he or she has acquired in this module of learning to specific duties in their job or in the community where he or she lives.	
Science – Learner is able to utilise and use science and technology effectively	
Collecting – Learner can effectively gather information	





Assessment Feedback Form			
	Comments / Remarks		
Feedback to learner on assessment and / or overall recommendations and action plan for competence			
Feedback from learner to assessor			
Assessment Judgement	You have been found: <input type="radio"/> Competent <input type="radio"/> Not yet competent in this unit standard	Actions to follow: <input type="radio"/> Assessor report to ETQA <input type="radio"/> Learner results and attendance certification issued	
Learner's Signature		Date:	
Assessor's Signature		Date:	
Moderator's Signature		Date:	



Step 8

Re-Assessment Procedures

- Note that only outcomes on which the learner was found not yet competent must be re-assessed.
- The same procedures in steps 6 and 7 are repeated.
- The tool must be adapted at discretion of the assessor. Best practice is not to present the exact same format and questions if possible.
- Use your expertise and judgement to ensure that the method of re-assessment remains integrated and relevant to the expected outcomes.

Step 9

Documentation

The following documentation is addressed in this step:

1. Learner and assessor information reports;
2. Assessor report and summative evidence collection summary;
3. Learner assessment re-actionnaire;
4. Assessor's assessment review and improvement document;
5. Assessment appeal form

1. Learner and Assessor Information Forms

The learner information form is in the assessment guide for learners. The assessor information form follows. These forms must be completed for each individual learner and placed in the learner's portfolio of evidence.

2. Assessor Report and Summative Evidence Collection Summary

This report follows after the information report. Use it to summarise the findings during assessment. Please complete the copy of this report that is in the learner assessment guide.

3. Learner Assessment Re-Actionnaire

A pro-forma for the learner assessment re-actionnaire is included in the learner assessment guide. Ask the learner to complete this form and sign it.

4. Assessor's Assessment Review and Improvement Document

The assessor is expected to complete the assessor review of the assessment process, using the pro-forma document of which an example follows. Please complete the copy of the document in the learner assessment guide. This document must be discussed with the learner and any learner commentary should be recorded.

5. Assessment Appeal Form

The assessment appeal form is also provided in the learner assessment guide. Assist the learner to complete the document if necessary.

The learner must be requested to sign-off all reports and documents before they are placed in the portfolio of evidence.



Assessor Information Form				
Unit Standard	116426			
Program Date(s)				
Surname				
First Name				
Company Name				
Job / Role Title				
Home Language				
Gender	Male		Female	
Race	African	Coloured	Indian/Asian	White
Employment	Permanent		Non-permanent	
Disabled	Yes		No	
Date of Birth				
ID Number				
Contact Telephone Numbers				
Email Address				
Postal Address				



Assessor's Assessment Review and Improvement Document	
Issues	Comments
Did the assessment go according to plan?	
Did anything unexpected happen?	
Were you pleased with the assessment decision; i.e. was it what you expected?	
How could the process have been carried out more efficiently?	
How could the process of assessing the knowledge be improved?	
How could the Performance Observation checklist be improved?	
Was the evidence you gathered sufficient to make a judgment of competence?	
Was the way you obtained feedback from the learner effective?	
Were you pleased with the way you communicated your decision to the learner? If not, how could this have been improved?	
How would you improve the assessment process?	

Any learner has the right of appeal against any not-yet-competent decision by the assessor. If the learner wishes to appeal, please assist him / her to complete the form below.

Appeal Form			
I hereby appeal against the outcome of my assessment.			
Date:			
Learner's Name:			
Assessors Name:			
Organisation:			
Assessment Details: Criteria, role, standards Used, etc.			
Issue to be Reviewed:			
Learner's Signature		Date:	
Assessor's Signature		Date:	

Step 10

Administration and Completion of Portfolio of Evidence

All the documents or copies thereof, as prescribed previously, must be kept on file as part of the learner portfolio of evidence.

Learner's portfolio of evidence must be readily available for internal and external moderation and verification by the appropriate practitioners, until after the verification process has taken place. The portfolio of evidence may then be kept or returned to the learner according to the service provider's policy.

The prescribed learner results form should be submitted to the ETQA or the National Learner Database as per the SETA procedure.