**Brief**

**Unit 4 Outcome 1 – Holistic Health P/L**

Holistic Health Pty Ltd has operated for three years, offering budget health insurance options to Victorians. Michael McMahon, the manager of Holistic Health (HH), is proud of the fact that, while being a small operation, Holistic Health remains competitive with the major market players. Michael is determined to remain a force in the market place and continually looks for ways to improve his business practices. His latest investigation involves the development of quotes for yearly fees for members. Currently, if a potential member calls Holistic Health and would like to know the fee that would apply to them, the member can make an appointment to see a representative in their own home, or at one of Holistic’s offices.

With the representative, they complete a survey that assesses their lifestyle and they select the options they would like with their insurance. The representative passes this information through to processing, which calculates a fee, develops the relevant documentation and posts the forms for completion to the customer.

Through his investigations, Michael has discovered that there are occasions when potential members have already signed with another insurance provider by the time that they receive the paperwork from Holistic. He would like to speed up this process so that a quote and the relevant paperwork can be provided at the meeting with the representative, and the members signed up on the spot.

Michael has provided you with example file data that outlines the data currently recorded by representatives during an appointment:

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Surname**  | **First name**  | **Address**  | **Suburb**  | **Pcode**  | **Age**  | **Risk Level**  | **Extras**  | **Health** **Chk**  | **Pay-ment**  |
| Schuler  | Presley  | 190 Greer Rd  | Belgrave  | 3160  | 45  | 5  | 1 |  | D |
| Arston  | Jane  | 1201 Broadway  | Burwood  | 3125  | 22  | 3  |   |  | B |
| Seinfeld  | Casey  | 17 Windy Way  | Camberwell  | 3124  | 44  | 5  | 2 |  | B |
| Peters  | Bob  | 200 Union St  | Clayton  | 3168  | 21  | 1  |  |  | A |

|  |  |
| --- | --- |
| **Age**  | **Fee ($)**  |
| <30  | 640  |
| 30-50  | 760  |
| >50  | 800  |

The second part of the fee is a risk-based factor. Based on the answers on a lifestyle questionnaire, the representative allocates a risk factor (1-6) to each member. Factors that affect risk levels include smoking and recreational activities.

|  |  |  |
| --- | --- | --- |
| **Risk**  | **Risk Level**  | **Fee ($)**  |
| 1  | Low Risk  | 0  |
| 2  | Low–Normal  | 125  |
| 3  | Normal  | 230  |
| 4  | High  | 25  |
| 5  | High–Extreme  | 320  |
| 6  | Extreme Risk  | 405  |

Members can select to have no extras, extras level 1 or 2. Level 1 or 2 costs are as follows:

|  |  |  |
| --- | --- | --- |
| **Extras Level**  | **Level Description**  | **Fee ($)**  |
| 1  | Select  | 125  |
| 2  | Full  | 250  |

The final calculation is based on the payment method. If members pay monthly, Holistic offers them a discount (direct debit payments are cheaper for Holistic to process than credit card payments). Annual payments via credit card are easier to process than other payment methods, so Holistic also offers a small discount for this method:

|  |  |  |
| --- | --- | --- |
| **Payment Code**  | **Description**  | **Discount (%)**  |
| A  | Direct Debit - Bank Account – Monthly  | 2.50  |
| B  | Credit Card – Monthly  | 2.25  |
| C  | Bank Debit/Credit Card Annual  | 1.00  |
| D  | Posted or Counter Payment – Annual  | 0  |

Michael would like representatives to be able to record the data from potential new members and immediately obtain a quote that outlines the yearly fee for Holistic Health. They should be able to print this quote so that members can sign up on the spot. Information from each representative would later be uploaded to the central system.

**Teacher advice**

For this outcome, students are required to solve an ongoing problem using a spreadsheet. Students are also expected to develop online user documentation. The solution must be able to be use reused at a later stage with a new set of data.

Students are expected to apply appropriate design tools to assist with the design stage of the problem-solving methodology.

As advised within the Information Technology Assessment handbook, assessment tasks should be completed mainly within class time. Teachers can determine the conditions for the task including whether students have access to resources and notes. Students should be clearly advised of the conditions under which the assessment will take place and the timeline for the task. IT Applications Unit 4 Outcome 1 consists of two tasks: the development of a solution (50 marks) and the evaluation report (10 marks). This outcome contributes 60 marks of the 100 marks allocated to School Assessed Coursework for Unit 4.

**Task 1: ICT solution (50 marks)**

**Part 1 – Development of the solution (40 marks)**

The scenario provided needs to allow students to analyse the current information processing practices of the organisation. Students should be able to develop a spreadsheet solution that can be used on an ongoing basis with new sets of data to support the goals of the system. The design of the solution should be documented using appropriate techniques that allow students to identify the input, processing and output required to create the solution (layout diagram). Students should apply appropriate formats and conventions to their solution. They should also be able to identify appropriate testing techniques, and complete and document the results of testing of the solution.

**Part 2 – User documentation (10 marks)**

The design of the onscreen user documentation to support the ongoing use of the solution needs to be documented using appropriate techniques (such as a site map, layout diagram, storyboard, and/or mock-up diagram). Students should apply appropriate formats and conventions to the development of the user documentation and use appropriate testing techniques to ensure the documentation works as intended. They also need to be able to evaluate how the user documentation meets the needs of the organisation.

**Task 2: Evaluation: Written report (10 marks)**

Students need to be able to evaluate how well their solution meets the information needs of the organisation via a questionnaire. They will need to propose a range of strategies that could be used to evaluate how the solution and user documentation meets the needs of the organisation.