

Office Admin Traineeship

# Office Admin - Electrical Contracting Training Guide

This Office Admin - Electrical Contracting training guide contains additional outcomes to the following units of competency in the Office Admin Traineeship.

Unit INF301	Maintain information records system to ensure integrity of system
Unit COM301	Collect and provide information to facilitate communication flow
Unit ENT201	Apply knowledge of the enterprise to promote the products and services of the organisation
Unit ENT301	Provide information and advice regarding the product/services of the organisation to meet client needs
Unit ENT302	Process client complaints to ensure the goals of the organisation are met
Unit FIN201	Prepare and process financial documentation for cash flow and accounting records
Unit FIN303	Monitor stock levels to maintain enterprise activities



ISBN 0 646 23409 8

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as the Adman Training Company  
FREECALL 1800 62 5652

Funded by the Department of Employment, Education, Training and Youth Affairs

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# **Office Admin Traineeship**

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## **Office Admin - Electrical Contracting Training Guide**

A guide to training in the specific skills your enterprise needs according to the National Clerical-Administrative Competency Standards (Private Sector)

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# Office Admin Electrical Contracting - Levels 2 & Level 3

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## Using this Guide on-the-job

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This Training Guide has been designed to help employers provide quality on-the-job training and assessment for trainees at Levels 2 and 3. It will enable you to develop in your trainee(s) all the general skills your office needs.

**It is part of a total training kit which includes:**

- Training Guides - Information Handling, Communication, Enterprise, Office Technology, Office Organisation, Teamwork, Financial Records, Workplace Environment and *Office Admin Electrical Contracting*
- Employer's Manual
- Trainee's Record Book
- National Clerical - Administrative Competency Standards (Private Sector) summary
- Office Admin Assessment Kit which verifies your trainee has achieved the competencies.

*Training Guide, Trainee's Record Book and Assessment Kit for the Workplace Environment and Office Admin Electrical Contracting are contained in single booklets.*

The Trainee's Record Book has an assessment records envelope on the back cover. A photocopy of the unit summary sheets from the Office Admin Assessment Kit and other training records, such as statements of attainment, can be stored in this envelope.

As well as on-the-job training, trainees must be given the opportunity to practise their skills to become competent.

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## Office Admin Electrical Contracting

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**This training package will help trainees develop the following enterprise skills:**

- understanding the aims and objective of your business, its personnel and departments and its products and services
- responding effectively to client enquiries and resolving issues related to products and services
- responding positively to visitors and their needs
- promoting a positive image of the enterprise
- following workplace Occupational Health & Safety procedures and policies.

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## Office Admin - Electrical Contracting Level 2 & Level 3

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### Resources

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- examples of previous enterprise problems and solutions
- organisational chart
- enterprise information, eg. brochures, products, services
- enterprise policy and procedures manual
- forms and documents that require completion
- examples of how documents are formatted
- list of names and positions
- office policies and procedures manual for handling customers and visitors, including difficult customers
- information regarding business etiquette
- map/floor plan of the enterprise
- enterprise OH&S guidelines and procedures
- *electrical Contracting industry promotional material.*

#### Other resources

- *National Clerical-Administrative Competency Standards (Private Sector)* - Admin Training Company, 1996
- *Assessor's Manual - Assessing Clerical - Administrative Competencies in the Workplace* - Admin Training Company 1993
- Open Learning Office Skills Program (OLOSP) Training Packages -South West College of TAFE - Warrnambool, 1994
- Worksafe Australia publications, GPO Box 58, Sydney 2001
- TRAC OH&S publications, Dusseldorp Skills Forum, 27-31 Macquarie Place Sydney NSW 2000
- *Everybody wins! A guide to using the National Clerical -Administrative Competency Standards in the Workplace* - Admin Training Company, 1995
- *Occupational Health and Safety Policy*, ACCI Review, No. 17 December 1995, pp. 8-12
- *Various electrical and electronics equipment and accessories catalogues*

## Office Admin Electrical Contracting - Level 2 & Level 3

This module intergrates the following units of competency (shaded).

ASF Level		Information Handling	Communication	Enterprise	Technology	Organisational	Team	Business Financial
2	CO	INF 201 INF 202	COM 201 COM 202	ENT 201 ENT 202	TEC 201 TEC 202 TEC 203	ORG 201	TEM 201	FIN 201
3	CO	INF 301	COM 301	ENT 301 ENT 302	TEC 301 TEC 302 TEC 303	ORG 301	TEM 301	
3	EL		COM 302			ORG 302		FIN 301 FIN 302 FIN 303

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## **Outcome - Maintain records of electrical installation work**

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### **Training strategies**

**Explain and show trainee:**

- the responsibilities in electrical safety and related regulations
- the scope of the Australian Standards and local regulations concerning the supply of electricity.
- the consequences of unsafe work practices.
- the need to maintain records of installation testing and completion.
- how to complete the appropriate document

**Answer any questions:**

- relating to electrical systems legislation and regulation.
- relating to unsafe work practices.

**Provide examples of:**

- safety requirements and responsibilities.
- documents required by the local supply authority for the supply of electricity and test reporting.

**Example:**

The trainee will, under supervision, complete the documentation necessary for the supply of electricity and testing reports.

NUE002  
INF301

Office Admin - Electrical Contracting  
Maintain information records system to ensure integrity of system

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## Outcome - Maintain records of electrical installation work

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### Assessment

#### Observe the trainee:

- complete documentation for supply of electricity and testing reports.

#### Ask trainee to:

- describe some of the responsibilities of electrical work in relation to safety of electrical installations.
- explain the differences between the Australian Standards and the supply authority's local service rules.
- describe the possible consequences of unsafe work practices.

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# Outcome - Prepare quotation presentations

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## Training strategies

### Explain and show trainee:

- the purpose of plans, specifications and tenders
- how quotations are prepared from job specifications and customer requests
- how quotation letters are prepared from estimators documentation and the information that should and **should not** be included
- how tender documents are prepared for submission
- the legal implications in quotations and tenders.

### Answer any questions:

- about the preparation of quotations and tenders and the implications of various clauses in specifications and tender documents.

**Provide examples** of quotation presentation documents from a variety of previously successful submissions.

Example:

The trainee is given previously successful quotations to use as a basis for preparing a new quotation.

Any differences between the original quotation and the trainee's presentation are to be discussed with his/her supervisor.

NUE002 Office Admin - Electrical Contracting

COM301 Collect and provide information to facilitate communication flow.

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## Outcome - Prepare quotation presentations

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### Assessment

#### Observe the trainee:

- collect and organise information required for the quotation.
- check for accuracy of the complete quotation presentation.

#### Ask trainee to:

- evaluate his/her performance to prepare and complete quotation presentations from estimation documentation.
- explain enterprise systems for preparing quotations.

#### Check:

- quotation presentations

## NUE002 Office Admin - Electrical Contracting

NUE002 Office Admin - Electrical Contracting

ENT201 Apply knowledge of the enterprise to promote the products and services of the organisation.

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# Outcome - Promote products and services

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## Training strategies

### Explain and show trainee:

- the scope of work and products used in the electrical contracting industry
- the roles, functions and services provided by personnel in the organisation
- how and why electrical power is distributed in a building.
- the purpose of a main switchboard and its associated equipment
- the purpose of a distribution board and its associated equipment

### Answer any questions:

- related to the main switchboard and distribution boards in a building.
- related to the work carried out and services provided in the electrical contracting industry.
- related to the products used and personnel in the organisation.

### Provide examples of:

- the work of various personnel in the organisation.
- electricity distributed in a building.

**Example:**

The trainee undertakes tour with a qualified supervisor of typical work sites to observe the work of various personnel, products used and observe a typical electrical distribution system being installed.

**NUE002 Office Admin - Electrical Contracting**

**ENT201 Apply knowledge of the enterprise to promote the products and services of the organisation.**

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## **Outcome - Promote products and services**

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### **Assessment**

#### **Observe the trainee:**

- advise potential clients of products and services provided by the organisation.

#### **Ask trainee to:**

- describe the roles and function of various personnel in the organisation.
- explain the various aspects of services and products associated with electrical distribution in a building.

## NUE002 Office Admin - Electrical Contracting

NUE002 Office Admin - Electrical Contracting

ENT301 Provide information and advice regarding product/services of the organisation to meet client needs

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### Outcome - Attend to customer enquiries

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#### Training strategies

##### Explain and show trainee:

- common electrical accessories including their purpose and typical location in a premises, eg: switches, fuses, circuit breakers, safety switch, electric motor, motor starter, fluorescent light and components, batten holder, socket outlet, main switch, switchboard and meter.
- how electricity is distributed in a building including the types of circuits and appliances they supply.
- ways to adequately and politely question customers to clearly determine the nature of their enquiry.

##### Answer any questions:

- related to electrical components and systems while the trainee observes services or installation work activities.
- related to determining the needs of a customer.

**Provide examples** of dealing with customer enquiries.

##### **Example:**

The trainee accompanies a services person responding to a request to attend to an electrical fault. The trainee observes the work carried out by the service person and compares this with original request. Anomalies between the original request and the work done are discussed and documented.

NUE002 Office Admin - Electrical Contracting

ENT301 Provide information and advice regarding product/services of the organisation to meet client needs

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## Outcome - Attend to customer enquiries

---

### Assessment

#### Observe the trainee:

- communicate appropriately with clients
- demonstrate a basic knowledge of electrical installation and equipment in responding to customer enquiries
- accurately documents customer enquiries.

#### Ask trainee to:

- evaluate his/her performance to adequately question customers to accurately determine the nature of their enquiry.
- explain enterprise systems and procedures for dealing with customers' enquiries.

#### Check:

- documentation of customer enquiries.

# Outcome - Attend to customer complaints

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## Training strategies

### Explain and show trainee:

- typical electrical problems and work practices that may be the subject of customer complaints
- ways to politely question customers to clearly determine the nature of their complaint.
- how to document customer complaints and forward them to the appropriate personnel.

### Answer any questions:

- related to electrical problems and work practices while the trainee is observing services or installation work activities.
- related to accurately determining and recording where necessary, the complaint of a customer.

**Provide examples** of dealing with customer complaints and effects of poor work practices.

**Example:**

The trainee accompanies a services person responding to a complaint. The trainee observes how the complaint is investigated and handled by the service person, and compares this with original complaint. Anomalies between the original complaint and the work done are discussed and documented.

## Outcome - Attend to customer complaints

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### Assessment

#### Observe the trainee:

- communicate appropriately with clients
- demonstrate a basic knowledge of electrical installation and equipment in responding to customer complaints
- clearly documents customer complaints
- attend to complaints in an effective and polite manner.

#### Ask trainee to:

- evaluate his/her performance to accurately question customers to determine the nature of their complaint
- explain enterprise systems and procedures for dealing with customer complaints.

#### Check:

- documentation of customer complaints.

# Outcome - Prepare invoices and service reports

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## Training strategies

### Explain and show trainee:

- how invoices are compiled from details and costing in job documentation
- the information that should and **should not** be included on an invoice
- how reports support invoices related to service work
- how to format invoices
- procedures for checking invoices before they are issued
- the importance of processing and issuing invoices within a particular time frame.

### Answer any questions:

- about work details and costing that are used to compile an invoice and the information that should and should not be included.
- about work related to processing, posting and issuing invoices within a particular time frame.

**Provide examples** of invoices and documentation from a variety of past installation and service work.

### **Example:**

The trainee compiles invoices from past job documentation and compares them with the 'real' invoices for the work. Differences between the original invoices and the trainees work are discussed.

## Outcome - Prepare invoices and service reports

---

### Assessment

#### Observe the trainee:

- demonstrate an adequate knowledge of electrical work activities to correctly prepare and complete service reports
- document and process invoices.

#### Ask trainee to:

- evaluate his/her performance to compile service reports and invoices accurately, from job documentation
- explain enterprise systems for processing and issuing invoices.

#### Check:

- documentation of service reports and invoices.

# Outcome - Prepare material orders

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## Training strategies

### Explain and show trainee:

- how to read and access information about electrical materials from manufacturers' and suppliers' hard and soft copy catalogues
- how to determine the materials required for a job from material lists in quotation and tender documents
- the importance of confirming pricing and the preferred supplier with the appropriate enterprise personnel
- how to enquire about material prices and confirm an agreed price
- how to place a telephone, fax or other forms of order
- how to document and process material orders.

### Answer any questions:

- about the purpose and typical unit quantities of materials required for various jobs
- about formally advising and processing orders

**Provide examples** of material orders from a variety of installation and service jobs.

#### **Example:**

The trainee assists an estimator take-off materials from job specifications. The trainee compiles a materials list which is then checked by the estimator.

## Outcome - Prepare material orders

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### Assessment

#### Observe the trainee:

- select correct items from manufacturers' and suppliers' catalogues
- make material price enquires and confirmation of agreed price
- place orders
- formally document and process orders

#### Ask trainee to:

- evaluate his/her performance to identify materials required in manufacturers' and suppliers' catalogues and compile a material list showing agreed process and discounts.
- explain enterprise systems to notify, document and process material orders.

#### Check:

- documentation of material orders.

**This completes the training guide for  
Electrical Contracting - Office Admin**

# **ASSESSMENT**

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## **INTRODUCTION**

This Section is part of the Office Admin Assessment Kit. The purpose of the Assessment Kit is to assess clerical and administrative skills and knowledge based on the National Clerical-Administrative Competency Standards (Private Sector).

The Kit contains:

- User Guide
- Skills Booklets (7)
- Guide for Collecting Evidence
- Assessment Protocols
- Guide to Completing the Checklists
- National Clerical-Administrative Competency Standards (Private Sector) summary

The Skills Booklets are based on the seven skill areas in the competency standards:

- Information Handling
- Communication
- Enterprise
- Technology
- Organisational
- Team
- Business Financial

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# Office Admin Electrical Contracting

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Assesed  
in this book

ASF Level	Information Handling	Communi- cation	Enterprise	Technology	Organisa- tional	Team	Business Financial	
2	CO	INF 201 INF 202	COM 201 COM 202	ENT 201 ENT 202	TEC 201 TEC 202 TEC 203	ORG 201	TEM 201	FIN 201
3	CO	INF 301	COM 301	ENT 301 ENT 302	TEC 301 TEC 302 TEC 303	ORG 301	TEM 301	
3	EL		COM 302			ORG 302		FIN 301 FIN 302 FIN 303

## **INF301 Maintain information records system to ensure integrity of the system**

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### **✓QUICK CHECK**

This Unit of Competency is about maintaining a filing system by adding new files, processing old files, and recording file movements. Do you have any knowledge, skills or experience in this area? For example, in the context of your workplace, can you sort files by codes, enter new files into the system, access the system correctly, account for files and identify and resolve problems when they arise?

If your answer is YES or UNSURE → turn the page

If your answer is NO → go to another core skill area

## **Outcome - Assemble new files**

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Collects and collates information to be incorporated into a new file.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Creates a new file to be inserted into an existing filing system.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Correctly indexes a new file.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Records the new file into a file recording system.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sorts files according to the appropriate code.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## **Outcome - Identify and process inactive and dead files**

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Identifies and removes or relocates a dead file.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identifies and removes or relocates an inactive file.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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## Outcome - Record documentation movements

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Records movements of files and documents in and out of a filing system.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identifies overdue files and documents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Takes steps to retrieve overdue files and documents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Takes appropriate steps to locate lost files.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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## Outcome - Maintain records of electrical installation work

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Completes documentation records for electrical installation testing and completion.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Describes the responsibilities of personnel and enterprise relating to safety in an electrical installation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Explains the differences between the Australian Standards and the supply authority's local service rules.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Describes the consequences of unsafe work practices.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Evidence notes

---

Tick the box here to show what type of evidence you used to assess competency for this Unit of Competency. You can tick more than one box.

	Self	Peer	Final
• Observation of performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Demonstration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Work samples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Training records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Questioning and discussion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Use this space to note any details of the evidence you used.

Candidate \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Colleague \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Final assessor \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**NUE002: Office Admin - Electrical Contracting**

**INF301: Maintain information records system to ensure integrity of the system**

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## **Is this an area of strength?**

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To help you judge this see the white laminated sheets titled 'Completing the Checklists', found in the inside cover of this Kit.

If you believe the skill on the opposite page is a strength, tick the box.

Self

Peer

Final

**INF301: Maintain information records system to ensure integrity of the system**

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# **INF301 Maintain information records systems to ensure integrity of the system**

---

Transfer any tick in the summary boxes at the end of each of the previous Elements of Competency to the boxes below.

	Self	Peer	Final
<b>Assemble new files</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Identify and process inactive and dead files</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Record documentation movements</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Maintain records of electrical installation work</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you have a tick in every Element summary box shown above (including self, colleague and final), enter C in the box below (otherwise leave blank).

**Unit of Competency INF 301**

When you tick off this Unit of Competency, you can also tick page 23 of the Information Handling Skills Assessment Booklet

Complete the details below ONLY when the Unit of Competency box is completed.

**VERIFICATION OF COMPETENCE**

Date assessment confirmed \_\_\_\_\_

Name of candidate \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

Name of colleague \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

Name of final assessor \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

## COM301 Collect and provide information to facilitate communication flow

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### ✓QUICK CHECK

This Unit of Competency is about providing information by responding to telephone, oral and written requests and drafting routine correspondence. Do you have any knowledge, skills or experience in this area? For example, in the context of your workplace, can you deal with requests for information appropriately? Can you draft correct and relevant correspondence, gain the correct signature and file it appropriately?

If your answer is YES or UNSURE → turn the page

If your answer is NO → go to Unit COM 302

## Outcome - Respond to telephone, oral and written requests for information

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Interacts courteously with internal and external customers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Understands requests for information or seeks further clarification until the request is understood.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Takes appropriate action to record requests for information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locates the requested information from internal sources and records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• by speaking to others</li> <li>• from written sources</li> <li>• by observation.</li> </ul>			
Understands purpose of routine texts.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>Element summary</b></p> <p>If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Outcome - Draft routine correspondence\* in response to a need or request

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Explains the need for different types of correspondence in an office (such as business letters and memos).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Obtains required information for inclusion in routine correspondence.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sets out required information in an appropriate format.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Drafts routine correspondence (such as business letters confirming arrangements) so that the intended meaning is readily understood by the recipient.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Presents draft to nominated officer for approval.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Files drafted correspondence for use as a standard reply to future requests for similar information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<p><b>Element summary</b></p> <p>If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).</p>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

\* Routine correspondence may include standard business letters and memos where details are varied within standard content and layout.

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## Outcome - Prepare quotation presentations

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Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Determines details of quotation from estimation documentation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepares quotation presentation to enterprise format or tender requirements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Forwards quotation presentations to appropriate enterprise personnel.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Element summary

If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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## Evidence notes

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Tick the box here to show what type of evidence you used to assess competency for this Unit of Competency. You can tick more than one box.

	Self	Peer	Final
• Observation of performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Demonstration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Work samples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Training records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Questioning and discussion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Use this space to note any details of the evidence you used.

Candidate \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Colleague \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Final assessor \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**NUE002: Office Admin - Electrical Contracting**  
**COM301: Collect and provide information to facilitate communication flow**

---

## Is this an area of strength?

---

To help you judge this see the white laminated sheets titled 'Completing the Checklists', found in the inside cover of this Kit.

If you believe the skill on the opposite page is a strength, tick the box.

Self

Peer

Final

## COM301 Collect and provide information to facilitate communication flow

Transfer any tick in the summary boxes at the end of each of the previous Elements of Competency to the boxes below.

	Self	Peer	Final
<b>Respond to telephone, oral and written requests for information</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Draft routine correspondence in response to a need or request</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Prepare quotation presentations</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you have a tick in every Element summary box shown above (including self, colleague and final), enter C in the box below (otherwise leave blank).

### Unit of Competency COM 301

When you tick off this Unit of Competency, you can also tick page 21 of the Communication Skills Assessment Booklet

Complete the details below ONLY when the Unit of Competency box is completed.

#### VERIFICATION OF COMPETENCE

Date assessment confirmed \_\_\_\_\_

Name of candidate \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

Name of colleague \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

Name of final assessor \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

## **ENT201 Apply knowledge of the enterprise to promote the products and services of the organisation**

---

### **✓QUICK CHECK**

This Unit of Competency is about knowledge of the enterprise and application of this knowledge. Do you have any knowledge, skills or experience in this area? For example, in the context of your workplace, can you handle enquiries and provide information or know who to direct people to for information?

If your answer is YES or UNSURE → turn the page

If your answer is NO → go to Unit ENT 202

**NUE002: Office Admin - Electrical Contracting**

**ENT201: Apply knowledge of the enterprise to promote the products and services of the organisation.**

---

## **Outcome - Apply knowledge of enterprise to complete routine administrative tasks**

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Uses the official title of the enterprise in all official business dealings.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Describes the key purpose or prime function of the enterprise.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identifies the types of products or services the enterprise provides.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lists the key departments or sections in the enterprise which are relevant to performing the job role.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Describes the functions of all key departments or sections which are relevant to the job role.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Uses the correct documentation and format for the enterprise in office procedures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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## **Outcome - Provide information from own function area**

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**NUE002: Office Admin - Electrical Contracting**

**ENT201: Apply knowledge of the enterprise to promote the products and services of the organisation.**

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Deals with internal and external enquiries promptly and courteously.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Uses appropriate questioning and summarising to establish the details of an enquiry.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Anticipates problems and clarifies these.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Provides information relevant to the enquirer's needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**NUE002: Office Admin - Electrical Contracting**

**ENT201: Apply knowledge of the enterprise to promote the products and services of the organisation.**

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## Outcome - Redirect enquiries

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Refers enquiries to someone who can deal with them when unable to provide the relevant information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Takes appropriate follow-up action if this person is not available.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clarifies, discusses and cites solutions to any problems arising.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

NUE002: Office Admin - Electrical Contracting

ENT201: Apply knowledge of the enterprise to promote the products and services of the organisation.

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## Outcome - Take follow-up action when required

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Takes appropriate action to follow up enquiries.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Obtains additional information and forwards it to the enquirer where necessary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Refers difficulties with follow-up action to the relevant person.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**NUE002: Office Admin - Electrical Contracting**

**ENT201: Apply knowledge of the enterprise to promote the products and services of the organisation.**

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## Outcome - Promote a positive image of the organisation

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Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Receives visitors promptly and politely.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Asks appropriate questions to establish visitors' requirements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Listens attentively to visitors' requirements.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Directs or escorts visitors to their destination within the organisation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Explains politely to a visitor the reason for any delay in offering assistance (e.g.: a delay in pre-arranged appointment, or absence of a staff member).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identifies situations outside own area of responsibility and promptly requests assistance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

NUE002: Office Admin - Electrical Contracting

ENT201: Apply knowledge of the enterprise to promote the products and services of the organisation.

---

## Outcome - Promote products and services

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Explains the roles and function of personnel in the organisation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Describes the various aspects of electrical power distribution in a building.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Advises potential clients of products and services provided by the organisation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**NUE002: Office Admin - Electrical Contracting**

**ENT201: Apply knowledge of the enterprise to promote the products and services of the organisation.**

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## Evidence notes

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Tick the box here to show what type of evidence you used to assess competency for this Unit of Competency. You can tick more than one box.

	Self	Peer	Final
• Observation of performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Demonstration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Work samples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Training records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Questioning and discussion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Use this space to note any details of the evidence you used.

Candidate \_\_\_\_\_

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Colleague \_\_\_\_\_

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Final assessor \_\_\_\_\_

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**NUE002: Office Admin - Electrical Contracting**

**ENT201: Apply knowledge of the enterprise to promote the products and services of the organisation.**

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## Is this an area of strength?

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To help you judge this see the white laminated sheets titled 'Completing the Checklists', found in the inside cover of this Kit.

If you believe the skill on the opposite page is a strength, tick the box.

Self

Peer

Final

# ENT201 Apply knowledge of the enterprise to promote the products and services of the organisation

Transfer any tick in the summary boxes at the end of each of the previous Elements of Competency to the boxes below.

	Self	Peer	Final
<b>Provide knowledge of enterprise to complete routine administrative tasks</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Provide information from own function area</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Redirect enquiries</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Take follow-up action where required</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Promote a positive image of the organisation</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Promote products and services</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you have a tick in every Element summary box shown above (including self, colleague and final), enter C in the box below (otherwise leave blank).

## Unit of Competency ENT 201

When you tick off this Unit of Competency, you can also tick page 27 of the Enterprise Skills Assessment Booklet

Complete the details below ONLY when the Unit of Competency box is completed.

### VERIFICATION OF COMPETENCE

Date assessment confirmed \_\_\_\_\_

Name of candidate \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

Name of colleague \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

Name of final assessor \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

## **ENT301 Provide information and advice regarding the products/services of the organisation to meet client needs**

---

### **✓QUICK CHECK**

This Unit of Competency is about clarifying the needs of a client and providing appropriate information and advice. Do you have any knowledge, skills or experience in this area? For example, can you readily identify the needs of clients, provide information advice about the relevant products and services, follow up on client needs within an accepted timeline?

If your answer is YES or UNSURE → turn the page

If your answer is NO → go to Unit ENT 302

## **Outcome - Clarify specific needs of client**

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Identifies the needs of a client.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clearly describes the features and benefits of the services and products provided by the organisation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Matches the needs of the client to the relevant goods and services.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Records a client's details clearly and accurately in an appropriate format.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Outcome - Provide information and advice

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Provides information or advice that meets a client's needs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suggests and discusses alternative sources of information or advice with a client.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offers follow-up alternatives.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Outcome - Follow up client needs

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Despatches further information as follow-up to a request.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Refers a request for information to an appropriate person if there are gaps in the information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## **Outcome - Attend to customer enquiries**

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Politely questions customers to clearly determine the nature of their enquiry	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clearly documents customer enquiries and forwards them to the appropriate personnel.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrates a basic knowledge of electrical installation and equipment in responding to customer enquiries	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Evidence notes

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Tick the box here to show what type of evidence you used to assess competency for this Unit of Competency. You can tick more than one box.

	Self	Peer	Final
• Observation of performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Demonstration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Work samples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Training records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Questioning and discussion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Use this space to note any details of the evidence you used.

Candidate \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Colleague \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Final assessor \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**NUE002: Office Admin - Electrical Contracting**  
**ENT301: Provide information and advice regarding the products/services of the organisation to meet client needs**

---

## **Is this an area of strength?**

---

To help you judge this see the white laminated sheets titled 'Completing the Checklists', found in the inside cover of this Kit.

If you believe the skill on the opposite page is a strength, tick the box.

	Self	Peer	Final
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## ENT301 Provide information and advice regarding the products/services of the organisation to meet client needs

Transfer any tick in the summary boxes at the end of each of the previous Elements of Competency to the boxes below.

	Self	Peer	Final
<b>Clarify specific needs of client</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Provide information and advice</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Follow up client needs</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Attend to customer enquiries</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you have a tick in every Element summary box shown above (including self, colleague and final), enter C in the box below (otherwise leave blank).

### Unit of Competency ENT 301

When you tick off this Unit of Competency, you can also tick page 21 of the Enterprise Skills Assessment Booklet.

Complete the details below ONLY when the Unit of Competency box is completed.

#### VERIFICATION OF COMPETENCE

Date assessment confirmed \_\_\_\_\_

Name of candidate \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

Name of colleague \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

Name of final assessor \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

## **ENT302 Process client complaints to ensure the goals of the organisation are met**

---

### **✓QUICK CHECK**

This Unit of Competency is about dealing with complaints in a way that meets the goals and interests of the enterprise. Do you have any knowledge, skills or experience in this area? For example, in the context of your workplace, can you record complaints, seek resolutions to them and implement these resolutions within acceptable timelines?

If your answer is YES or UNSURE → turn the page

If your answer is NO → go to another core skill area

## **Outcome - Clarify the nature of the complaint**

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Deals promptly and courteously with a complaint from an internal or external client.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Establishes the details of a complaint by attentive listening and questioning.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Records an accurate and concise summary of a complaint for follow-up action.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Apologises in an appropriate manner to a client who is inconvenienced.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## **Outcome - Identify options for resolution**

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Identifies appropriate options for resolving a complaint.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Refers a complaint to the appropriate person if it cannot be resolved.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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## **Outcome - Act to resolve complaint**

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Negotiates a solution with a client who has made a complaint.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Takes steps to implement the solution once it has been negotiated.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finalises any necessary documentation to resolve the dispute (e.g.: completing a credit note or drafting a letter of apology).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identifies any necessary changes to enterprise procedures as a result of the complaint.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

---

## **Outcome - Attend to customer complaints**

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Politely questions customer to clearly determine the nature of their complaint.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clearly documents customer complaints and forwards them to the appropriate personnel.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Handles customer complaints promptly and courteously.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Evidence notes

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Tick the box here to show what type of evidence you used to assess competency for this Unit of Competency. You can tick more than one box.

	Self	Peer	Final
• Observation of performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Demonstration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Work samples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Training records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Questioning and discussion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Use this space to note any details of the evidence you used.

Candidate \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Colleague \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Final assessor \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**NUE002: Office Admin - Electrical Contracting**  
**ENT302: Process client complaints to ensure the goals of the organisation are met**

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## **Is this an area of strength?**

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To help you judge this see the white laminated sheets titled 'Completing the Checklists', found in the inside cover of this Kit.

If you believe the skill on the opposite page is a strength, tick the box.

Self	Peer	Final
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## ENT302 Process client complaints to ensure the goals of the organisation are met

Transfer any tick in the summary boxes at the end of each of the previous Elements of Competency to the boxes below.

	Self	Peer	Final
<b>Clarify the nature of the complaint</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Identify options for resolution</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Act to resolve complaint</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Attend to customer complaint</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you have a tick in every Element summary box shown above (including self, colleague and final), enter C in the box below (otherwise leave blank).

### Unit of Competency ENT 302

When you tick off this Unit of Competency, you can also tick page 27 of the Enterprise Skills Assessment Booklet

Complete the details below ONLY when the Unit of Competency box is completed.

#### VERIFICATION OF COMPETENCE

Date assessment confirmed \_\_\_\_\_

Name of candidate \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

Name of colleague \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

Name of final assessor \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

# Summary of the skill area

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(To be completed by assessment candidate)

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Candidate Name \_\_\_\_\_

To summarise your competency in this skill area, transfer your competency ratings from each Unit of Competency to this page. Write 'Competent' for those Units in which you have a 'C' in the Unit of Competency box.

A blank line indicates there is insufficient evidence of competency at this time.

**ENT 201**      **Apply knowledge of the enterprise to promote the products and services of the organisation**

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**ENT 301**      **Provide information and advice regarding the products/services of the organisation to meet client needs**

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**ENT 302**      **Process client complaints to ensure the goals of the organisation are met**

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## FIN201 Prepare and process financial documentation for cash flow and accounting records

---

### ✓QUICK CHECK

This Unit of Competency is about recording and balancing petty cash, reconciling and preparing invoices and preparing and processing banking documents. Do you have any knowledge, skills or experience in this area? For example, in the context of your workplace, can you check numerical information for accuracy, account for and balance petty cash, prepare accurately invoices and send them, fill out banking documents and bundle cash, cheques and credit card slips for banking?

If your answer is YES or UNSURE → turn the page

If your answer is NO → go to Unit FIN 301

---

## Outcome - Record and balance petty cash transactions

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Checks petty cash claims for accuracy and authenticity before processing.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Correctly processes a petty cash claim by: <ul style="list-style-type: none"><li>reimbursing claims correctly</li><li>recording petty cash transactions in a Petty Cash Book</li><li>correctly reimbursing the petty cash fund.</li></ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reconciles the Petty Cash Book and takes appropriate action if the petty cash does not reconcile with the Petty Cash Book.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Correctly identifies irregularities in petty cash transactions and refers them to the appropriate person.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Maintains the security of petty cash.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

---

## Outcome - Reconcile invoices for payments to creditors

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Identifies correctly authorised invoices issued to the organisation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identifies discrepancies between invoices and delivery documents.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Processes authorised invoices for payment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identifies errors in invoice charges and reports these to the appropriate person	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Takes appropriate action as directed to rectify discrepancies and errors.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Resolves creditor enquiries or refers then to the appropriate person.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**NUE002: Office Admin - Electrical Contracting**

**FIN201: Prepare and process financial documentation for cash flow and accounting record**

---

## Outcome - Prepare invoices for debtors

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Performs calculations (such as addition, subtraction, percentage discount) to produce an accurate statement of account.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transcribes data (such as name and address of debtor, details of transaction) accurately onto a statement of account.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Distributes statements for verification by the appropriate person prior to despatch.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensures statement details are copied and filed for auditing purposes prior to despatch.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Despatches verified statements within appropriate timelines.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).			

---

## Outcome - Prepare and process banking documents

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Collates and totals cash, cheques and credit card vouchers and presents to the bank according to accepted bank procedures (such as bundled notes and bagged coin).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adopts procedures to maintain security of money being processed for banking.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accurately records transaction details and money totals on banking documentation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Balances all money calculations with pay-in documentation - cash, cheque, credit cards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Balances bank deposit totals with internal records such as a cashbook or receipt book.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Takes appropriate action to rectify an imbalance between bank deposit totals and internal records.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Completes a cheque and cheque butt correctly.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can process a credit card and an EFTPOS transaction and verify cheque and credit card payments prior to acceptance.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accurately completes and issues receipts.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

---

## Outcome - Prepare invoices and service reports

---

Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Determines details and costing to be included invoices from job documentation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepares service reports detailing work done and materials used to support invoice	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Checks invoices with appropriate enterprise personnel.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Issues invoices within the current invoicing period.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Element summary

If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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**NUE002: Office Admin - Electrical Contracting**

**FIN201: Prepare and process financial documentation for cash flow and accounting record**

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## Evidence notes

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Tick the box here to show what type of evidence you used to assess competency for this Unit of Competency. You can tick more than one box.

	Self	Peer	Final
• Observation of performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Demonstration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Work samples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Training records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Questioning and discussion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Use this space to note any details of the evidence you used.

Candidate \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Colleague \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Final assessor \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**NUE002: Office Admin - Electrical Contracting**

**FIN201: Prepare and process financial documentation for cash flow and accounting record**

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## Is this an area of strength?

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To help you judge this see the white laminated sheets titled 'Completing the Checklists', found in the inside cover of this Kit.

If you believe the skill on the opposite page is a strength, tick the box.

Self

Peer

Final

## FIN201 Prepare and process financial documentation for cash flow and accounting records

Transfer any tick in the summary boxes at the end of each of the previous Elements of Competency to the boxes below.

	Self	Peer	Final
Record and balance petty cash	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reconcile invoices for payments to creditors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare invoices for debtors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare and process banking documents	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Prepare invoices and service reports	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you have a tick in every Element summary box shown above (including self, colleague and final), enter C in the box below (otherwise leave blank).

### Unit of Competency FIN 201

When you tick off this Unit of Competency, you can also tick page 9 of the Business Financial Skills Assessment Booklet

Complete the details below ONLY when the Unit of Competency box is completed.

#### VERIFICATION OF COMPETENCE

Date assessment confirmed \_\_\_\_\_

Name of candidate \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

Name of colleague \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

Name of final assessor \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

## FIN303 Monitor stock levels to maintain enterprise activities

## **NUE002: Office Admin - Electrical Contracting**

### **✓QUICK CHECK**

This Unit of Competency is about maintaining stock levels and stock control records. Do you have any knowledge, skills or experience in this area? For example, in the context of your workplace, can you maintain stocks for the efficient running of the office? Can you maintain records and deal with stock discrepancies?

If your answer is YES or UNSURE → turn the page

If your answer is NO → go to another core skill area

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## Outcome - Monitor and maintain stock levels

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Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Determines optimum stock levels to ensure constant productivity is maintained.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Adequately controls the purchase, receipt, storage and issue of stock.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Values stock using the nominated valuation method.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reconciles physical and perpetual stock levels.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Rectifies any discrepancies in stock levels or reports them promptly to the appropriate person.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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## Outcome - Maintain stock control records

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Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Checks stock records against original order.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accurately maintains stock records to ensure confidentiality and security of information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensures that stock records are maintained for the period determined by government legislation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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## Outcome - Prepare material orders

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Tick only those boxes which apply to the person being assessed.

	Self	Peer	Final
Selects correct items from manufacturers' and suppliers' catalogues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consults preferred suppliers to confirm agreed prices of materials.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Processes orders in accordance with enterprise procedures.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Element summary</b> If every box in your column has a tick, put a tick in the corresponding summary box (otherwise, leave empty).	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## Evidence notes

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Tick the box here to show what type of evidence you used to assess competency for this Unit of Competency. You can tick more than one box.

	Self	Peer	Final
• Observation of performance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Demonstration	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Work samples	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Training records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• Questioning and discussion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Use this space to note any details of the evidence you used.

Candidate \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Colleague \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Final assessor \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**NUE002: Office Admin - Electrical Contracting**  
**FIN303: Monitor stock levels to maintain enterprise activities**

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## Is this an area of strength?

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To help you judge this see the white laminated sheets titled 'Completing the Checklists', found in the inside cover of this Kit.

	Self	Peer	Final
If you believe the skill on the opposite page is a strength, tick the box.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

## FIN303 Monitor stock levels to maintain enterprise activities

Transfer any tick in the summary boxes at the end of each of the previous Elements of Competency to the boxes below.

	Self	Peer	Final
<b>Monitor and maintain stock levels</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Maintain stock control records</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Prepare material orders</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

If you have a tick in every Element summary box shown above (including self, colleague and final), enter C in the box below (otherwise leave blank).

### Unit of Competency FIN 303

When you tick off this Unit of Competency, you can also tick page 29 of the Business Financial Skills Assessment Booklet.

Complete the details below ONLY when the Unit of Competency box is completed.

#### VERIFICATION OF COMPETENCE

Date assessment confirmed \_\_\_\_\_

Name of candidate \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

Name of colleague \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

Name of final assessor \_\_\_\_\_

Position \_\_\_\_\_ Signature \_\_\_\_\_

Organisation \_\_\_\_\_ Telephone \_\_\_\_\_

## Summary of the course achievements

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(To be completed by assessment candidate)

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Candidate Name \_\_\_\_\_

To summarise your competency in this skill area, transfer your competency ratings from each Unit of Competency to this page. Write 'Competent' for those Units in which you have a 'C' in the Unit of Competency box.

A blank line indicates there is insufficient evidence of competency at this time.

<b>INF 301</b>	<b>Maintain information records system to ensure integrity of system</b>	
<b>COM 301</b>	<b>Collect and provide information to facilitate communications flow</b>	_____ _____
<b>ENT 201</b>	<b>Apply knowledge of the enterprise to promote the products and services of the organisation</b>	_____
<b>ENT 301</b>	<b>Provide information and advice regarding the products/services of the organisation to meet client needs</b>	
<b>ENT 302</b>	<b>Process client complaints to ensure the goals of the organisation are met</b>	_____
<b>FIN 201</b>	<b>Prepare and process financial documentation for cash flow and accounting records</b>	_____
<b>FIN303</b>	<b>Monitor stock levels to maintain enterprise activities</b>	_____