Apply point of sale handling techniques

D2.TCS.CL5.01

Assessor Manual

Australian Aid
asean
William Angliss Institute
Specialist centre for foods, tourism & hospitality

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Competency Based Assessment (CBA) – An Introduction for Assessors

Assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency.

Suggested Assessment Methods

For each unit of competency a number of assessment tools have been identified including:

- Work Projects
- Oral Questions
- Written Questions
- Third Party Statements
- Observation Checklists.

Instructions and Evidence Recording Sheets have been identified in this Assessment Manual for use by Assessors.

Alternative Assessment Methods

Whilst the above mentioned assessment methods are suggested assessment methods, the assessor may use an alternate method of assessment taking into account:

a) The nature of the unit
b) The strengths of participants
c) The number of participants in the class
d) Time required to complete assessments
e) Time dedicated to assessment
f) Equipment and resources required.

Alternate assessment methods include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals/slides/audiotapes

- Case studies
- Log books
- Projects and Role plays
- Group projects
- Recognition of Prior Learning.

Whilst there is no specific instruction or evidence collection documents for all the alternative assessment methods, assessors can record competency in the ‘Other’ section within the ‘Competency Recording Sheet’.

Selection of Assessment Methods

Each assessor will determine the combination of Assessment Methods to be used to determine Competency for each Competency Unit on a student by student basis.

‘Sufficient’ evidence to support the ‘Pass Competent’/’Not Yet Competent’ decision must be captured.

In practice this means a minimum of 2 – 3 Assessment Methods for each candidate for each Competency Element is suggested.

At least one method should provide evidence of practical demonstration of competence.

The following assessment methods deemed to provide evidence of practical demonstration of competence include:

- Practical Work Projects
- Third Party Statement
- Observation Checklist.

Assessing Competency

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- ‘Pass Competent’ (PC)
- ‘Not Yet Competent’ (NYC).

Pass Competent (PC)

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as ‘Pass Competent’ (PC).

The assessor will award a ‘Pass Competent’ (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

Not Yet Competent’ (NYC)

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be ‘Not Yet Competent’ (NYC).

This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

a) Undertake further training or instruction

b) Undertake the assessment task again until they are deemed to be ‘Pass Competent’.

Regional Qualifications Framework and Skills Recognition System

The ‘Regional Qualifications Framework and Skills Recognition System’, also known as the ‘RQFSRS’ is the overriding educational framework for the ASEAN region.

The purpose of this framework is to provide:

- A standardised teaching and assessment framework
- Mutual recognition of participant achievement across the ASEAN region. This includes achievement in individual Units of Competency or qualifications as a whole.

The role of the ‘RQFSRS’ is to provide, ensure and maintain ‘quality assurance’ across all countries and educational providers across the ASEAN region.

Recognition of Prior Learning (RPL)

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

This process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)
- Skills auditing
- Gap analysis and training
- Credit transfer.

Code of Practice for Assessors

This Code of Practice provides:

- Assessors with direction on the standard of practice expected of them
- Candidates with assurance of the standards of practice expected of assessors
- Employers with assurance of the standards maintained in the conduct of assessment.

The Code detailed below is based on the International Code of Ethics and Practice (The National Council for Measurement in Education [NCME]):

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity
- Potential forms of conflict of interest in the assessment process and/or outcomes are identified and appropriate referrals are made, if necessary
- All forms of harassment are avoided throughout the planning, conducting, reviewing and reporting of the assessment outcomes

- The rights of the candidate are protected during and after the assessment
- Personal and interpersonal factors that are not relevant to the assessment of competency must not influence the assessment outcomes
- The candidate is made aware of rights and process of appeal
- Evidence that is gathered during the assessment is verified for validity, reliability, authenticity, sufficiency and currency
- Assessment decisions are based on available evidence that can be produced and verified by another assessor
- Assessments are conducted within the boundaries of the assessment system policies and procedures
- Formal agreement is obtained from both the candidate and the assessor that the assessment was carried out in accordance with agreed procedures
- The candidate is informed of all assessment reporting processes prior to the assessment
- The candidate is informed of all known potential consequences of decisions arising from an assessment, prior to the assessment
- Confidentiality is maintained regarding assessment results
- The assessment results are used consistently with the purposes explained to the candidate
- Opportunities are created for technical assistance in planning, conducting and reviewing assessment procedures and outcomes.

Instructions and Checklist for Assessors

Instructions

General instructions for the assessment:

- Assessment should be conducted at a scheduled time that has been notified to the candidate
- Facilitators must ensure participants are made aware of the need to complete assessments and attend assessment sessions
- If a participant is unable to attend a scheduled session, they must make arrangements with the Assessor to undertake the assessment at an alternative time
- At the end of the assessment the Assessor must give feedback and advise the participant on their PC/NYC status
- Complete the relevant documentation and submit to the appropriate department.

Preparation

- Gain familiarity with the Unit of Competency, Elements of Competency and the Performance Criteria expected
- Study details assessment documentation and requirements
- Brief candidate regarding all assessment criteria and requirements.

Briefing Checklist

- Begin the assessment by implementing the following checklist and then invite the candidate to proceed with assessment.

Checklist for Assessors

Prior to the assessment I have:	**Tick (✓)**	**Remarks**
Ensured the candidate is informed about the venue and schedule of assessment.		
Received current copies of the performance criteria to be assessed, assessment plan, evidence gathering plan, assessment checklist, appeal form and the company's standard operating procedures (SOP).		
Reviewed the performance criteria and evidence plan to ensure I clearly understood the instructions and the requirements of the assessment process.		
Identified and accommodated any special needs of the candidate.		
Checked the set-up and resources for the assessment.		
During the assessment I have:		
Introduced myself and confirmed identities of candidates.		
Put candidates at ease by being friendly and helpful.		
Explained to candidates the purpose, context and benefits of the assessment.		
Ensured candidates understood the assessment process and all attendant procedures.		
Provided candidates with an overview of performance criteria to be assessed.		
Explained the results reporting procedure.		
Encouraged candidates to seek clarifications if in doubt.		
Asked candidates for feedback on the assessment.		
Explained legal, safety and ethical issues, if applicable.		
After the assessment I have:		
Ensured candidate is given constructive feedback.		
Completed and signed the assessment record.		
Thanked candidate for participating in the assessment.		

Instructions for Recording Competency

Specifications for Recording Competency

The following specifications apply to the preparation of Evidence Gathering Plans:

- A Competency Recording Sheet must be prepared for each candidate to ensure and demonstrate all Performance Criteria and Competency Elements are appropriately assessed. This Sheet indicates how the Assessor will gather evidence during their assessment of each candidate
- This Competency Recording Sheet is located at the end of the Assessment Plan
- It is the overriding document to record competency
- The Assessor may vary the Competency Recording Sheet to accommodate practical and individual candidate and/or workplace needs
- Assessor must place a tick (✓) in the 'Assessment Method' columns to identify the methods of assessment to be used for each candidate
- Multiple Competency Elements/Performance Criteria may be assessed at the one time, where appropriate
- The assessor and participant should sign and date the Competency Recording Sheet, when all forms of evidence and assessment have been completed
- The assessor may provide and feedback or clarify questions which the participant may have in regards to the assessment grade or findings
- All documents used to capture evidence must be retained, and attached to the Competency Recording Sheet for each candidate for each Competency Unit.

Instructions for Different Assessment Methods

Specifications for Work Project Assessment

These guidelines concern the use of work projects.

The work projects identified in the Training Manuals involve a range of tasks, to be performed at the discretion of the Assessor.

Work project tasks can be completed through any form of assessment as identified in the Trainer and Trainee Manuals and stated at the start of this section.

Assessors should follow these guidelines:

- Review the Work Projects at the end of each 'Element of Competency' in the Trainee Manual to ensure you understand the content and what is expected
- Prepare sufficient resources for the completion of work activities including:
    - Time – whether in scheduled delivery hours or suggested time participants to spend outside of class hours
    - Resources – this may involve technical equipment, computer, internet access, stationery and other supplementary materials and documents
- Prepare assessment location (if done in class) making it conducive to assessment
- Explain Work Projects assessment to candidate, at the start of each Element of Competency. This ensures that participants are aware of what is expected and can collate information as delivery takes place

- Assessors can use the following phrase as a guide (where an 'X' is identified, please input appropriate information):

  "At the end of each Element of Competency there are Work Projects which must be completed. These projects require different tasks that must be completed.

  These work projects are part of the formal assessment for the unit of competency titled X:

  - You are required to complete these activities:
    a) *Using the 'X' method of assessment*
    b) *At 'X' location*
    c) *You will have 'X time period' for this assessment*
  - You are required to compile information in a format that you feel is appropriate to the assessment
  - Do you have any questions about this assessment?"
- Commence Work Project assessment:
  - The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
  - Participants complete work projects in the most appropriate format
  - Participants must submit Work Project evidence to the assessor before the scheduled due date
- Assessor must assess the participant's evidence against the competency standards specified in each Element of Competency and their own understanding. The assessor can determine if the participant has provided evidence to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Oral Question Assessment

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:
  - Enter Student name
  - Enter Assessor name
  - Enter Location
- Familiarise self with Questions to be asked
- Prepare assessment location (table and chairs) making it conducive to assessment
- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These oral questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability and I will record whether or not you have answered correctly.

We have 60 minutes for this assessment.

  - I will give you feedback at the end of the assessment
  - Do you have any questions about this assessment?"

- Commence Oral Questioning assessment:
  - Complete Assessment Record for the Oral Questioning by:
    a) Ticking PC or NYC, as appropriate
    b) Entering 'Remarks' as required
    c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Written Question Assessment

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

- Familiarise self with Questions and Answers provided
- Print and distribute copies of 'Written Questions' for participants. Ideally this should take place with adequate time for participants to answer all questions before the expected due date
- Explain Written Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These written questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability.

  You may refer to your subject materials, however where possible try to utilise your existing knowledge when answering questions.

  Where you are unsure of questions, please ask the Assessor for further instruction. This may be answering the question orally or asking the assessor to redefine the question.

  We have X time for this assessment:

  - The due date for completion of this assessment is X
  - On this date you must forward the completed questions to the assessor by X time on the date of X
  - Do you have any questions about this assessment?"
- The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
- Participants may record written answers (where possible)
- Participants must submit the written answers to the assessor before the scheduled due date

- Assessor must assess the participant's written answers against the model answers provided as a guide, or their own understanding. The assessor can determine if the participant has answered the questions to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Observation Checklist

These specifications apply to the use of the Observation Checklist in determining competency for candidates.

Only an approved assessor is authorised to complete the Observation Checklist.

The assessor is required to observe the participant, ideally in a simulated environment or their practical workplace setting and record their performance (or otherwise) of the competencies listed on the Observation Checklist for the Competency Unit.

To complete the Observation Checklist the Assessor must:

- Insert name of candidate
- Insert assessor name
- Insert identify of location where observations are being undertaken
- Insert date/s of observations – may be single date or multiple dates
- Place a tick in either the 'Yes' or 'No' box for each listed Performance Criteria to indicate the candidate has demonstrated/not demonstrated that skill
- Provide written (and verbal) feedback to candidate – as/if appropriate
- Sign and date the form
- Present form to candidate for them to sign and date
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Observation Checklist.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the participant.

Specifications for Third Party Statement

These specifications relate to the use of a relevant workplace person to assist in determining competency for candidates.

The Third Party Statement is to be supplied by the assessor to a person in the workplace who supervises and/or works closely with the participant.

This may be their Supervisor, the venue manager, the Department Manager or similar.

The Third Party Statement asks the Supervisor to record what they believe to be the competencies of the participant based on their workplace experience of the participant. This experience may be gained through observation of their workplace performance, feedback from others, inspection of candidate's work etc.

A meeting must take place between the Assessor and the Third Party to explain and demonstrate the use of the Third Party Statement.

To complete the Third Party Verification Statement the Assessor must:

- Insert candidate name
- Insert name and contact details of the Third Party
- Tick the box to indicate the relationship of the Third Party to the candidate
- Present the partially completed form to the Third Party for them to finalise
- Collect the completed form from the Third Party
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Third Party Statement.

The Third Party must:

- Record their belief regarding candidate ability/competency as either:
    - Pass Competent = Yes
    - Not Yet Competent = No
    - Unsure about whether candidate is competent or not = Not Sure
- Meet briefly with the assessor to discuss and/or clarify the form.

This source of evidence combines with other forms of assessment to assist in determining the ‘Pass Competent’ or ‘Not Yet Competent’ decision for the candidate.

A separate Third Party Statement is required for each Competency Unit undertaken by the candidate.

Competency standard

UNIT TITLE: APPLY POINT OF SALE HANDLING TECHNIQUES	**NOMINAL HOURS:** 30
UNIT NUMBER: D2.TCS.CL5.01	
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to operate point of sale equipment and provide related customer services.	
ELEMENTS AND PERFORMANCE CRITERIA	**UNIT VARIABLE AND ASSESSMENT GUIDE**
Element 1: Prepare point of sale for service **1.1** Identify *point of sale equipment, facilities and systems* **1.2** *Prepare point of sale equipment, facilities and systems* for use **1.3** *Open the point of sale area* for service **Element 2: Operate point of sale equipment** **2.1** *Operate point of sale equipment, facilities and system* according to manufacturer's instructions **2.2** Operate point of sale *wrapping and packing equipment* and use *wrapping and packing materials* according to manufacturer's instructions and house policies	**Unit Variables** The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. This unit applies to all industry sectors that provides point of sale facilities within the labour divisions of the hotel and travel industries and may include: 1. Tour Operation 2. Travel Agencies *Point of sale equipment, facilities and systems* may be related to: • Cash register/terminal, including stand-alone and integrated units and systems, and cash drawers • Scanners • Electronic labelling equipment • Electronic funds transfer point of sale (EFTPOS) facilities • Portable data entry equipment • Internal cash transfer systems

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Element 3: Conduct point of sale transactions **3.1** *Process sales* in accordance with customer wishes **3.2** *Accept payment* for goods and services purchased **3.3** *Establish rapport with customers* during the service **3.4** *Optimise sales* for each transaction, as appropriate **3.5** *Process returns, refunds and exchanges* **3.6** *Create and maintain efficient service levels* at point of sale area **3.7** *Conduct bag searches* **3.8** Complete *point of sale documentation* to accompany transactions **Element 4: Wrap and pack items** **4.1** *Select appropriate wrapping and packaging material* for goods **4.2** *Wrap and pack items* purchased by customers **4.3** *Make arrangements to forward or transfer goods* in accordance with customer requirements **Element 5: Close the point of sale area** **5.1** Close and *reconcile the register/terminal* **5.2** Shut down point of sale equipment	• Weighing machines • Internal communication systems • Security systems • Wrapping and packing equipment • Documentation including all sales, complaint, refund, lay-by, returned goods and other operational and advice related forms, vouchers, brochures and documents. *Prepare point of sale equipment, facilities and systems* may include: • Turning on power to electrical units, as required • Conducting pre-start operational checks • Following manufacturer’s instructions • Complying with in-house procedures and requirements • Replenishing depleted supplies required to support point of sale operation • Obtaining money to enable sales transactions, including floats and change • Changing dates and operator identification on point of sale registers/terminals, if required • Replacing register/terminal audit roll • Cleaning equipment and facilities • Confirming operational readiness of all equipment, facilities and systems • Tidying service area. *Open the point of sale area* may include: • Confirming operational readiness with supervisor • Obtaining authority to commence processing sales • Removing barriers • Unlocking doors

5.3 *Requisition items* required for next session **5.4** *Activate security systems*, where appropriate **5.5** Finalise *internal documentation related to transactions and service* **5.6** Notify management of *issues arising during service session*	• Turning on service light • Inviting customers to the sales processing area. *Operate point of sale equipment, facilities and systems* should include: • Registers/terminals: ▪ Opening register/terminal ▪ Recording/registering sales including single and multiple sales using scanning facilities and alpha-numeric and function keys ▪ Performing price /product look ups (PLU) ▪ Cancelling items ▪ Entering ‘no sales’ ▪ Activating receipt function ▪ Performing item enquiries ▪ Calculating discounts ▪ Entering ‘reduced to clear’ items ▪ Changing prices/system to accommodate ‘happy hours’ ▪ Performing closing functions according to house practice, including reconciliation and clearing procedures ▪ Locking registering • Scanners: ▪ Using hand-held scanners and integrated scanners ▪ Reading prices from coded items ▪ Conducting single and multiple reads ▪ Operating the terminal/register in conjunction with scanner operation

	• Electronic labelling equipment: ▪ Generating electronic adhesive and other labels ▪ Producing bar code labels to integrate with electronic terminals/sales • EFTPOS facilities: ▪ Processing credit and debit sales ▪ Adhering to house/floor limits, as applicable ▪ Refusing/regretting declined transactions ▪ Processing electronic sales documentation ▪ Performing ‘cash out’ function, where applicable ▪ Performing required security checks to validate transactions • Portable data entry equipment: ▪ Initiating equipment ▪ Charging the unit and exchanging batteries/power units ▪ Entering stock data according to house policies ▪ Amending data, including adding stock to initial entries, allowing for sold and/or damaged, or out-of-date stock, correcting input errors ▪ Transferring/transmitting data ▪ Creating totals and generating required reports and/or statistics resulting from use of portable data entry equipment • Cash transfer systems: ▪ Manual or pneumatic ▪ Obtaining change ▪ Forwarding cash from point of sale.

	• Weighing machines: ▪ Operating electronic or other scales, including stand-alone scales and scales integrated with terminal/register ▪ Clearing scale readings ▪ Setting price per item for different items ▪ Reading scales ▪ Adjusting scales ▪ Identifying false reads and errors ▪ Calculating selling prices ▪ Ensuring hygienic condition of scales • Internal communication: ▪ Making public announcements ▪ Using internal telephone system, including communication with individuals and departments ▪ Using internal paging system to contact or alert other staff • Security systems and devices: ▪ Tagging items with security devices ▪ Removing security tags and devices from items ▪ De-activating security devices and alarms ▪ Re-setting security devices and systems ▪ Over-riding security alerts and alarms.

	Wrapping and packing equipment may include: • Plastic and paper wrapping equipment, including shrink-wrap and heat-seal items, where applicable and rollers and cutters • Tape and string dispensers. *Wrapping and packing materials* may include: • Paper, bubble wrap, tissue paper and plastic film, including gift wrapping items • Styrofoam spacers • Pre-used/re-cycled cartons, boxes and crates • Built boxes and containers • Bags and pouches • Tubing, hat boxes and suit bags • Bottle bags • Envelopes • Mailers • Tape, string and other ties, including decorative tape and ribbons. Process sales may include: • Scanning item • Using product look ups (PLU) function/keys • Referring to hard copy price lists • Reading and interpreting labels • Visually identifying product or service to be paid for • Entering data into register/terminal using keys • Factoring in allowable discounts

- Determining final selling price for items purchased, including sub-totalling purchases if requested by customer
- Registering transaction, including activation of item and/or departmental keys, where applicable
- Explaining charges to customers
- Resolving disputes relating to selling prices and prices charged, including techniques for addressing situations where customers have been over-charged
- Removing items from the transaction as required by customer
- Re-keying/re-processing transactional errors.

Accept payment should relate to:

- Accepting payment by cash
- Identifying and processing non-cash payment options as accepted by the host enterprise, including cheques, travellers’ cheques, debit and credit cards, vouchers, accounts including charges posted to guest room
- Demonstrating effective and secure cash handling skills
- Calculating and supplying correct change.

Establish rapport with customers may include:

- Greeting customer, including use of customer name, where appropriate
- Demonstrating respect for and appreciation of the customer and their purchase
- Responding to customer questions
- Initiating and participating in polite conversation with customers
- Notifying customers of specials available
- Congratulating customer on their purchase
- Entering customer into applicable competitions, as applicable, on the basis of their purchase.

	Optimise sales may include: - Making recommendations and suggestions - Applying up-selling techniques - Applying add-on sales techniques. *Process returns, refunds and exchanges* will include: - Evaluating transaction against house policies and legal requirements that apply to return, refund or exchange transactions - Acting as an agent for the customer while protecting the position of the enterprise - Applying fairness and high levels of customer service skills to each return, refund or exchange transaction - Apologising, where appropriate - Explaining situations where a return, refund or exchange cannot be processed - Verifying proof of purchase, or proof of ownership, for return, refund or exchange transactions - Completing the appropriate documentation to record the transaction - Contacting supervisor for advice and guidance, where required - Recording the process, as appropriate, on the point of sale register/terminal. *Create and maintain efficient service levels* may include: - Processing transactions quickly but not at the expense of acceptable customer service levels - Monitoring the point of sale area to identify and action situations where operational requirements, including cash/change and service-related documents are running short

	• Advising customers of expected delays in processing their transactions, including explaining the cause of the delay and advising the anticipated length of delay • Clear and clean service area where spills have occurred • Monitor and clean the area around the point of sale service area. *Conduct bag searches* may include: • Advising customer of intent to search bag • Complying with host country legislation and enterprise policies in relation to bag searches • Inspecting customer bags without touching contents • Implementing house policy where customer refuses to allow their bag(s) to be searched • Advising security and/or management where an illegal act is suspected or has been detected. *Point of sale documentation* may include: • Advance deposits • Refunds, returns and exchanges • Invoices and receipts • Paperwork related to non-cash transactions, including vouchers, accounts and charges to rooms • Special orders and special requests • Lay-bys • Stock transfers • Discarded or un-useable stock that has been removed from sale • Electronic funds transfer point of sale (EFTPOS) sales and transactions

	• Cash transfers and internal change requisitions • End-of-trade or end-of-shift reconciliations. *Select appropriate wrapping and packaging material* may include: • Matching materials to the product to be wrapped • Ensuring protection of fragile items • Taking into account the costs associated with wrapping and packaging options • Accommodating specific customer requirements, where possible • Providing gift wrapping services, where applicable • Charging customer for nominated wrapping and packaging as appropriate to house policies. *Wrap and pack items* may include: • Ensuring safety of items wrapped and packed • Presenting an appealing final product to the customer • Completing the wrapping and packaging process in a timely manner commensurate with high levels of customer service • Ensuring final packages are secure, not too heavy or over-loaded and able to be carried by the customer or transported by a carrier, as appropriate • Providing special wrapping and packaging services for goods that are to be transported or delivered. *Make arrangements to forward or transfer goods* may include: • Obtaining and recording delivery details • Contacting agents for transportation on behalf of the customer • Obtaining payment for delivery, as appropriate

	• Advising customer in relation to relevant legal issues, including prohibition on the delivery of tobacco and alcohol to minors • Forwarding items to customer pick-up bays or to other areas for collection by delivery service providers • Insuring items prior to transit • Notifying customer when goods have been dispatched • Following up with customers to ensure items have arrived as anticipated *Reconcile the register/terminal* may include: • Counting the cash drawer • Undertaking register/terminal readings • Determining anticipated takings • Determining actual takings, including consideration of all cash and non-cash transactions • Recording takings details onto the appropriate internal documentation • Investigating discrepancies within designated scope of authority. *Requisition items* may include: • Stock items, where required by house operating policies • Items required to support the operation of the point of sale area, including security devices, documentation, wrapping and packaging materials • Change • Special requests.

Activate security systems may include:

- Turning on security devices
- Locking doors, windows and display cabinets
- Setting alarms
- Conducting physical inspection of the area to ensure no people remain on the premises after lock up.

Internal documentation related to transactions and service may include:

- Vouchers that have been accepted as payment
- All documentation to support non-cash transactions
- Invoices to support cash payments made from the register/terminal
- Signed documentation to support postings to accounts
- Cash summary sheets
- Takings sheets
- Change request forms
- Refund, return and exchange documentation.

Issues arising during service session may relate to:

- Disputes with customers
- Suspicious persons or events
- Instances where equipment or systems malfunctioned or failed to function as required
- Instances where service, safety or security levels were compromised
- Theft, assaults or emergency situations, including situations where outside assistance or authorities were involved
- Suggestions made by customers, including feedback received whether solicited or not.

Assessment Guide

The following skills and knowledge must be assessed as part of this unit:

- The enterprise’s policies and procedures in regard to cash handling, equipment operation, scopes of authority to make point of sale decisions regarding refunds, returns and exchanges, authorisation to operate point of sale registers/terminals, wrapping and packing of items including their transportation to other sites/customer homes
- Knowledge of host country consumer and fair trading legislation in relation to refunds, exchanges and return of goods
- Knowledge of industry codes of practice that apply to retail sales within the host enterprise
- Principles of customer service including negotiation and dispute resolution skills
- Ability to use verbal and non-verbal communication skills with an emphasis on questioning and active listening techniques
- Basic literary and numeracy skills to allow reading of labels and price lists and calculation of selling-related figures, such as discounts, extensions and amount of change due
- Theft minimisation and stock security techniques.

Linkages To Other Units

- Manage and resolve conflict situations
- Promote hospitality products and services
- Provide advice to patrons on food and beverage services
- Maintain quality customer/guest service
- Process a financial transaction for services rendered
- Process transactions for purchase of goods and services
- Process financial transactions
- Promote products and services to customers

- Process a financial sale transaction
- Clean public areas, facilities and equipment
- Establish and maintain a safe and secure workplace
- Operate basic security equipment
- Process liquor sales at a bar facility.

Critical Aspects of Assessment

Evidence of the following is essential:

- Understanding of host enterprise policies and procedures in regard to cash handling, equipment operation, scopes of authority to make point of sale decisions regarding refunds, returns and exchanges, authorisation to operate point of sale registers/terminals, wrapping and packing of items including their transportation to other sites/customer homes
- Demonstrated ability to prepare a nominated point of sale area for operation and open that area ready for business
- Demonstrated ability to accurately and effectively operate at least five different nominated point of sale pieces of equipment, one of which must be a register/terminal, to process a nominated range of at least six point of sale transactions which must include:
  - Registering a sale
  - Giving change
  - Accepting payment by credit card
  - Processing a refund
- Demonstrated ability to conduct a legal and polite bag search on a nominated customer at a point of sale area
- Demonstrated ability to safely and securely wrap and pack at least four different nominated items, one of which must be gift-wrapped, according to stated customer requirements using a range of designated materials and equipment.

Context of Assessment

Assessment must ensure:

- Actual or simulated workplace application of point of sale handling techniques.

Resource Implications

Training and assessment must include the use of real money and non-cash payment options, real registers/terminals, real point of sale equipment, real products, and real or simulated customers and customer contact and sales situations.

Assessment Methods

The following methods may be used to assess competency for this unit:

- Observation of practical candidate performance
- Role plays
- Practical exercises
- Inspection of equipment that has been prepared and used
- Analysis of audit rolls from registers/terminals to assess accuracy and efficiency of equipment use
- Feedback from customers who have been served at point of sale areas
- Oral and written questions
- Third party reports completed by a supervisor
- Project and assignment work.

Key Competencies in this Unit

Level 1 = competence to undertake tasks effectively

Level 2 = competence to manage tasks

Level 3 = competence to use concepts for evaluating

	Key Competencies	Level	Examples
	Collecting, organising and analysing information	1	Reading manufacturer's instructions and house policies on equipment operation
	Communicating ideas and information	1	Explaining charges to customers
	Planning and organising activities	1	Preparing point of sale equipment and area for operation
	Working with others and in teams	1	Liaising with management and security staff to address security issues
	Using mathematical ideas and techniques	1	Calculating discounts and charges
	Solving problems	1	Resolving errors and over-charges
	Using technology	1	Processing transactions through point of sale registers/terminals; using equipment that is integrated into point of sale registers/terminals

Oral questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Apply point of sale handling techniques D2.TCS.CL5.01
Instructions	1. Ask student questions from the attached list to confirm knowledge, as necessary 2. Place tick in boxes to reflect student achievement (Pass Competent ‘PC’ or Not Yet Competent ‘NYC’) 3. Write short-form student answer in the space provided for each question.

Questions	**Response**	
	PC	**NYC**
1. Name a workplace and identify the POS equipment, facilities and systems in place at that location.	☐	☐
2. Identify one POS item of equipment and one POS system and describe what is required to prepare them for use at the start of a shift.	☐	☐

Questions	Response	
	PC	NYC
3. What is involved in opening a POS area for service?	☐	☐
4. Identify and explain how to operate two POS items (pieces of equipment, facilities or systems).	☐	☐
5. Name two items you have sold/might sell and describe how you would wrap/package these for customers to take away with them.	☐	☐

Questions	Response	
	PC	NYC
6. Describe a sales situation and explain what is involved in processing that sale including accepting cash and non-cash payment for the item sold and completing relevant documentation.	☐	☐
7. How do you establish and maintain a positive rapport with customers when conducting POS transactions/when selling?	☐	☐
8. Give me an example of what you might say/do in a sales situation to optimise sales without pressuring the customer and presenting a win-win opportunity to both the business and the customer.	☐	☐

Questions	Response	
	PC	NYC
9. A customer has returned with a product they bought earlier from the organisation: they claim the item is faulty – how will you handle/process this situation, what documentation will you complete and what details need to be recorded?	☐	☐
10. Explain what you do/monitor to create and maintain efficient service levels at POS areas.	☐	☐
11. Tell me (or show me) how you would conduct a legal bag search of a customer who is leaving the shop.	☐	☐

Questions	Response	
	PC	NYC
12. A customer has asked that their purchase be forwarded to a given address: how will you deal with this request?	☐	☐
13. Explain what is involved in closing and reconcile a register at the end of trading.	☐	☐
14. Identify two pieces of POS equipment and describe how to shut them down at the end of trade.	☐	☐

Questions	Response	
	PC	NYC
15. Describe what you do at the end of trade to ensure goods/products are replenished for the next service session.	☐	☐
16. What do you do to activate security systems for the business or POS area at the end of trade?	☐	☐
17. At the end of trade/end of a shift, what documentation do you need to complete and what general information is provided on this documentation?	☐	☐

Questions	Response	
	PC	NYC
18. Give me an example of how you might notify management of a problem/issue encountered during a shift that warrants discussion/their attention.	☐	☐

Written questions

Apply point of sale handling techniques – D2.TCS.CL5.01

Student Name: ____

Answer all the following questions and submit to your Trainer.

1. Identify and describe the use/role/function of two POS items, systems or facilities.

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2. Name four examples of documentation which may be required to support the sales process when preparing a POS area for service.

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3. Give four examples of opening procedures for a POS sales area.

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4. What two generic requirements must be observed when preparing POS equipment, facilities and systems for use?

5. Why is it important for the POS area to open 'on time'?

6. Identify four activities/considerations when opening the POS area.

7. Identify and describe basic operating instructions for one item of POS equipment.

8. Identify and describe the basic operating instructions for another one item of POS equipment in addition to the one used for the previous question.

9. What is the most common form of wrapping/packing used in POS areas?

10. Identify four wrapping/packing materials other than the one identified in the answer to the previous question.

11. Describe four important keys when processing sales.

12. Describe four activities staff may need to perform when processing sales.

13. Identify four non-cash options customers may have for paying for purchases.

14. Describe four examples of standard cash handling skills required when processing a sale in a POS area.

15. Give four reasons POS staff should establish rapport with customers.

16. Describe four actions POS staff can take to establish rapport with customers.

17. Give four reasons it is important for POS staff to create sales when processing sales.

18. Identify three generic techniques POS staff might use for optimising sales.

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19. Give four situations under which customers have a right to return items for a refund.

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20. Answer ‘Yes’ or ‘No’ to the following:

Do customers have a legal right to return an item for refund if they have changed their mind about buying it?

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Should POS staff always apologise when processing returns/refunds?

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21. Describe four activities/requirements inherent in keeping POS areas functioning at their most efficient and effective.

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22. Identify two keys which must always be observed when conducting a bag check/search.

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23. Identify six details which need to be recorded when completing advance deposit documentation.

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24. Name and describe requirements for completing one POS document to accompany a transaction other than an advanced deposit form/record.

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25. Identify four considerations to take into account when selecting wrapping and packaging materials.

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26. Identify six key factors when wrapping and packing items at a POS area.

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27. List four occasions when there may be a need to make arrangement to forward/transfer goods bought by customers.

28. Name six activities which may be required when making arrangements for forwarding/transferring goods bought by customers.

29. What is the name given to a register/terminal reading that provides a ‘subtotal’ reading or a ‘cumulative’ total/reading?

30. What is the name given to the document used to record the revenue from a register/terminal?

31. Identify four checks which might be made when investigating an unacceptable variance as part of the reconciliation process for a register.

32. Describe two generic examples of 'acceptable error' in terms of variances when reconciling a register/terminal.

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33. Identify three 'general rules' which apply to shutting down POS equipment.

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34. List three generic activities commonly undertaken at the same time equipment in the POS area is shut down.

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35. What is a Requisition form used for?

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36. Identify five standard pieces of information required when completing a Requisition form.

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37. List four activities POS may be required to undertake in order to secure the area at the end-of-trade.

38. Identify four documents which may need to be completed at the end-of-trade.

39. Identify four reasons staff de-briefings are held.

40. Give four examples of issues which may be discussed at staff de-briefings.

Answers to written questions

Apply point of sale handling techniques – D2.TCS.CL5.01

The following are model answers only – Trainers/Assessors must use discretion when determining whether or not an answer provided by a Student is acceptable or not.

1. **Identify and describe the use/role/function of two POS items, systems or facilities.**

   No model answer – responses will depend on items chosen by students.

2. **Name four examples of documentation which may be required to support the sales process when preparing a POS area for service.**

   - Complaint forms
   - Receipts
   - Refund documentation
   - Lay-by documentation
   - Returned goods documentation
   - Operational documentation
   - Advice related documentation forms.

3. **Give four examples of opening procedures for a POS sales area.**

   - Turning on power to electrical units
   - Conducting pre-start operational checks
   - Updating and checking register
   - Replenishing supplies
   - Obtaining money
   - Cleaning and tidying.

4. **What two generic requirements must be observed when preparing POS equipment, facilities and systems for use?**

   - Follow manufacturer's instructions
   - Adhere to internal protocols/training/SOPs.

5. **Why is it important for the POS area to open 'on time'?**

   There may be customers waiting and it is important to meet promises made about opening hours/times.

6. **Identify four activities/considerations when opening the POS area.**

   - The standard procedures of the workplace must be followed
   - It is important to adhere the established sequence of events for opening
   - There can be internal protocols about who is allowed to open the POS area
   - It is important for the area to open ‘on time’
   - Participating in staff meeting/briefing
   - Checking personal appearance/uniform
   - Confirming readiness to open with supervisor
   - Removing and storing barriers
   - Unlocking doors
   - Turning on designated items
   - Inviting customers to the sales processing area.

7. **Identify and describe basic operating instructions for one item of POS equipment.**

   No model answer – responses will depend on items chosen by students.

8. **Identify and describe the basic operating instructions for another one item of POS equipment in addition to the one used for the previous question**

   No model answer – responses will depend on items chosen by students.

9. **What is the most common form of wrapping/packing used in POS areas?**

   Bags

10. **Identify four wrapping/packing materials other than the one identified in the answer to the previous question.**

    - Paper
    - Bubble wrap
    - Tissue paper
    - Plastic film
    - Gift wrapping items including ribbons and bows
    - Styrofoam spacers
    - Pre-used cartons, boxes and crates
    - Built boxes and containers (‘flat pack’ boxes constructed ‘as needed’)
    - Pouches
    - Tubing, hat boxes and suit bags
    - Envelopes and mailers.

11. Describe four important keys when processing sales

- Treat each transaction as an individual interaction with a customer
- Be polite and courteous
- Ensure honesty and accuracy
- Provide advice and assistance, where requested or required.

12. Describe four activities staff may need to perform when processing sales.

- Scan each item the customer wants to purchase
- Use product look up function
- Refer to hard copy price lists
- Read and interpret labels
- Identify product or service to be paid for
- Enter data into register/terminal
- Factor in allowable discounts
- Determine final selling price for items purchased
- Explain charges to customers
- Resolve disputes with customers
- Remove items from the transaction as required by customer
- Re-key/re-process transactional errors.

13. Identify four non-cash options customers may have for paying for purchases.

- Debit/credit cards/EFTPOS
- Cheques – personal/business
- Travellers' cheques
- Vouchers/coupons
- Charges to account/room.

14. Describe four examples of standard cash handling skills required when processing a sale in a POS area.

- Advise the customer of the total of their purchase
- Say 'please' when asking for payment
- Thank the person for tendering payment
- State the value of the note/payment they offer in payment
- Register the payment leaving the money tendered out of the cash register
- Calculate and count the change required out of the register and count it aloud into customer's hand
- Thank the customer again – when change has been given/accepted

- Put payment into the register – when customer has accepted their change
- Close the register drawer.

15. Give four reasons POS staff should establish rapport with customers.

- Provide a basis for making extra sales/optimising sales
- Make the time when customers pay for their purchases a positive experience
- Deliver service which meets/exceeds customer expectations
- Provide a point of difference between service providers
- Demonstrate gratitude, appreciation and thanks
- Comply with internal SOPs and policies.

16. Describe four actions POS staff can take to establish rapport with customers.

- Greeting customer
- Responding to customer questions
- Initiating and participating in conversation with customers
- Notifying customers of specials available
- Comment to the customer on their purchase
- Entering customer into competitions.

17. Give four reasons it is important for POS staff to create sales when processing sales.

- Generate income
- Enhance business viability
- Secure jobs
- Maintain/increase market share
- Deliver a better service experience to the customer.

18. Identify three generic techniques POS staff might use for optimising sales.

- Making buyers aware of other things which are available
- Up-selling
- Using add-on selling.

19. Give four situations under which customers have a right to return items for a refund.

- The item is not same as the one they were shown/had demonstrated to them
- The item is faulty and customer could not have realistically known about it
- The item did not perform as sales staff described it would
- The item fails to measure up to the description that was made about it.

20. Answer ‘Yes’ or ‘No’ to the following:

Do customers have a legal right to return an item for refund if they have changed their mind about buying it? YES

Should POS staff always apologise when processing returns/refunds? YES

21. Describe four activities/requirements inherent in keeping POS areas functioning at their most efficient and effective.

- Be accurate
- Process transactions quickly
- Give quality service
- Monitor the point of sale area
- Ensure sufficient supplies of Cash/change and Service-related documents
- Clear and clean service area where spills have occurred
- Adjust air conditioning, lighting and music as required throughout trade
- Advise customers of expected delays in processing their transactions
- Monitor and clean the area around the point of sale service area.

22. Identify two keys which must always be observed when conducting a bag check/search.

- Never force anyone to submit to a search
- Never touch items in the bag.

23. Identify six details which need to be recorded when completing advance deposit documentation.

- Name of customer
- Name of/type of booking (travel, accommodation, tickets, goods, services)
- Method used to make deposit payment
- Date and time
- Name of person processing the transaction
- Amount paid
- Balance outstanding.

24. Name and describe requirements for completing one POS document to accompany a transaction other than an advanced deposit form/record.

No model answer – responses will depend on items chosen by students.

25. Identify four considerations to take into account when selecting wrapping and packaging materials.

- The customer being served – some customers are VIPs and receive premium service while others may not
- The item being sold
- Customer preferences
- Time available
- Cost
- Need to protect items from damage
- Organisational policies
- Consistency of finished product.

26. Identify six key factors when wrapping and packing items at a POS area.

- Maintain positive contact with the customer
- Work quickly
- Ensure the safety of the item being wrapped/packed
- Focus on the end result
- Never over-load bags
- Take care to ensure the final packages are secure and not too heavy to be carried safely/easily by the customer or transported by a carrier
- Provide special wrapping and packaging services for goods that are to be transported/delivered
- Thank the customer again when the wrapping/packing is completed.

27. List four occasions when there may be a need to make arrangement to forward/transfer goods bought by customers.

- The customer is an international traveller
- They are ordered via mail order
- A phone order is taken
- It is an internet sale
- A home delivery has to be made
- It is an order for delivery to another store/business house.

28. Name six activities which may be required when making arrangements for forwarding/transferring goods bought by customers.

- Obtaining forwarding/delivery details from customer
- Recording delivery details
- Contacting agents for transportation on behalf of the customer
- Obtaining payment from the customer for the delivery, as appropriate
- Advising customer in relation to relevant legal issues
- Forwarding items within the organisation to customer pick-up bays or to other areas for collection by Delivery service providers or Customers
- Insuring items prior to transit
- Notifying customer when goods have been dispatched
- Following up with customers to ensure items have arrived as anticipated.

29. What is the name given to a register/terminal reading that provides a ‘subtotal’ reading or a ‘cumulative’ total/reading?

X reading

30. What is the name given to the document used to record the revenue from a register/terminal?

Summary Sheet (or Takings Sheet)

31. Identify four checks which might be made when investigating an unacceptable variance as part of the reconciliation process for a register.

- Recounting the coins and notes to confirm their totals are correct
- Recounting the individual non-cash transactions to verify their totals
- Recalculating figures as found on Summary/Takings Sheet to ensure the problem is not an arithmetic one
- Checking for any over-rings.

32. Describe two generic examples of ‘acceptable error’ in terms of variances when reconciling a register/terminal.

- Takings that are 2% or less, below printout figures may be seen as acceptable
- In other cases, it may be that takings that are within a certain money value of the readings are deemed to be acceptable.

33. Identify three ‘general rules’ which apply to shutting down POS equipment.

- If an item was turned ‘on’ at the start of trade it will need to be turned ‘off’ at the end of trade
- Most electrical items are turned off ‘at the machine’
- Some items are left ‘on’ all the time.

34. List three generic activities commonly undertaken at the same time equipment in the POS area is shut down.

- Inspecting of items – to look for damage and check need for service/repairs
- Spot cleaning – such as wiping down items
- Tidying of the area.

35. What is a Requisition form used for?

To order stock from the stores to replace/replenish stock that has been used/sold.

36. Identify five standard pieces of information required when completing a Requisition form.

- Date
- Name of department/location requesting the stock
- Description of stock – giving sufficient details to enable store personnel to select and supply the correct items required
- Number/amount/quantity required
- Name of person requesting stock/items.

37. List four activities POS may be required to undertake in order to secure the area at the end-of-trade.

- Closing access doors and locking them
- Activating ‘closed’ signs
- Closing and locking windows
- Closing and locking displays and showcases
- Turning on security devices
- Activating alarms
- Checking operational status of security system to verify it is working
- Conducting physical inspection of the sales/POS area
- Working in conjunction/cooperation with dedicated security staff
- Notifying security/management when required security protocols have been completed or initiated.

38. Identify four documents which may need to be completed at the end-of-trade.

- Documents to support non-cash payments
- Taking sheets/Summary sheet
- Receipts and Cash Out documents/records
- Documentation signed by customers – to support posting of charges to guest/customer accounts
- Change request forms
- Refund, return and exchange documentation
- Incident reports
- Accident and injury reports.

39. Identify four reasons staff de-briefings are held.

- Provide an opportunity to raise problems/issues with management
- Give management an opportunity to communicate with workers
- Share information
- Finalise unfinished business.

40. Give four examples of issues which may be discussed at staff de-briefings.

- Anything – no limit as to what can be discussed
- Disputes which took place with customers
- Suspicious persons or events
- Instances where equipment or systems malfunctioned or failed to function as required
- Instances where SOPs were compromised in terms of Service delivery, Customer and/or staff safety, Business, property, stock or cash security
- Situations where outside assistance or authorities were involved/had to be summoned
- Input made by customers.

Observation checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Apply point of sale handling techniques D2.TCS.CL5.01
Dates of observation	
Instructions	1. Over a period of time observe the student completing each of the following tasks: a) Prepare point of sale for service b) Operate point of sale equipment c) Conduct point of sale transactions d) Wrap and pack items e) Close the point of sale area 2. Enter the date on which the tasks were undertaken 3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise 4. Complete the feedback sections of the form, if required.

Did the candidate	**Yes**	**No**
Element 1:Prepare point of sale for service		
Identify point of sale equipment, facilities and systems	☐	☐
Prepare point of sale equipment, facilities and systems for use	☐	☐
Open the point of sale area for service	☐	☐
Element 2: Operate point of sale equipment		
Operate point of sale equipment, facilities and system according to manufacturer’s instructions	☐	☐
Operate point of sale wrapping and packing equipment and use wrapping and packing materials according to manufacturer’s instructions and house policies	☐	☐

Did the candidate	Yes	No
Element 3: Conduct point of sale transactions		
Process sales in accordance with customer wishes	☐	☐
Accept payment for goods and services purchased	☐	☐
Establish rapport with customers during the service	☐	☐
Optimise sales for each transaction, as appropriate	☐	☐
Process returns, refunds and exchanges	☐	☐
Create and maintain efficient service levels at point of sale area	☐	☐
Conduct bag searches	☐	☐
Complete point of sale documentation to accompany transactions	☐	☐
Element 4: Wrap and pack items		
Select appropriate wrapping and packaging material for goods	☐	☐
Wrap and pack items purchased by customers	☐	☐
Make arrangements to forward or transfer goods in accordance with customer requirements	☐	☐
Element 5: Close the point of sale area		
Close and reconcile the register/terminal	☐	☐
Shut down point of sale equipment	☐	☐
Requisition items required for next session	☐	☐
Activate security systems, where appropriate	☐	☐
Finalise internal documentation related to transactions and service	☐	☐
Notify management of issues arising during service session	☐	☐
Did the student's overall performance meet the standard?	☐	☐

Feedback to student and trainer/assessor
Strengths:
Improvements needed:
General comments:

Candidate signature		**Date**	
Assessor signature		**Date**	

Third Party Statement

Student name:			
Name of third party:		**Contact no:**	
Relationship to student:	☐ Employer ☐ Supervisor ☐ Colleague ☐ Other *Please specify:____* *Please do not complete the form if you are a relative, close friend or have a conflict of interest]*		
Unit of competency:	Apply point of sale handling techniques D2.TCS.CL5.01		

The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence.

Please answer these questions as a record of their performance while working with you. Thank you for your time.

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Prepares identified point of sale equipment, facilities and systems for use	☐	☐	☐
Opens the point of sale area for service	☐	☐	☐
Operates point of sale equipment, facilities and systems including wrapping and packing according to manufacturer's instructions	☐	☐	☐
Processes sales, accepts payment for goods and services purchased and completes accompanying POS documentation	☐	☐	☐
Establishes rapport with customers during service and optimises sales for each transaction, as appropriate	☐	☐	☐
Processes returns, refunds and exchanges	☐	☐	☐
Creates and maintains efficient service levels at point of sale area	☐	☐	☐
Conducts bag searches	☐	☐	☐
Wraps and packs items and/or arranges for forwarding or transferring of goods	☐	☐	☐
Closes POS reconciling register, shutting down equipment and following all organisational closing procedures	☐	☐	☐

Comments/feedback from Third Party to Trainer/Assessor:

Third party signature:	**Date:**
Send to:	

Competency recording sheet

Name of Student		
Name of Assessor/s		
Unit of Competency	Apply point of sale handling techniques	D2.TCS.CL5.01
Date assessment commenced		
Date assessment finalised		
Assessment decision	Pass Competent / Not Yet Competent (Circle one)	
Follow up action required (Insert additional work and assessment required to achieve competency)		
Comments/observations by assessor/s		

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	**Observation of skills**	**3rd Party Statement**	**Oral Questions**	**Written Questions**	**Work Projects**	**Other**
Element 1: Prepare point of sale for service						
Identify point of sale equipment, facilities and systems						
Prepare point of sale equipment, facilities and systems for use						
Open the point of sale area for service						
Element 2: Operate point of sale equipment						
Operate point of sale equipment, facilities and system according to manufacturer’s instructions						
Operate point of sale wrapping and packing equipment and use wrapping and packing materials according to manufacturer’s instructions and house policies						
Element 3: Conduct point of sale transactions						
Process sales in accordance with customer wishes						
Accept payment for goods and services purchased						
Establish rapport with customers during the service						
Optimise sales for each transaction, as appropriate						
Process returns, refunds and exchanges						

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Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	**Observation of skills**	**3rd Party Statement**	**Oral Questions**	**Written Questions**	**Work Projects**	**Other**
Create and maintain efficient service levels at point of sale area						
Conduct bag searches						
Complete point of sale documentation to accompany transactions						
Element 4: Wrap and pack items						
Select appropriate wrapping and packaging material for goods						
Wrap and pack items purchased by customers						
Make arrangements to forward or transfer goods in accordance with customer requirements						
Element 5: Close the point of sale area						
Close and reconcile the register/terminal						
Shut down point of sale equipment						
Requisition items required for next session						
Activate security systems, where appropriate						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	**Observation of skills**	**3rd Party Statement**	**Oral Questions**	**Written Questions**	**Work Projects**	**Other**
Finalise internal documentation related to transactions and service						
Notify management of issues arising during service session						

Candidate signature:		**Date:**	
Assessor signature:		**Date:**	

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