



Australian Government

CPPCMN3005 Complete client documentation

Release: 1

CPPCMN3005 Complete client documentation

Modification History

Release 1.

Supersedes and is equivalent to CPPCMN3005A.

Unit of competency upgraded to reflect Standards for Training Packages 2012.

This version first released with CPP Property Services Training Package Version 6.

Application

This unit of competency specifies the skills and knowledge required to complete client documentation in the property services industry.

It includes gathering and verifying the information required to complete client documentation, and processing client documentation.

The unit supports the work of those engaged in servicing in a range of property services contexts.

No licensing, legislative, regulatory, or certification requirements apply to this unit of competency at the time of endorsement.

Pre-requisite Unit

Nil

Competency Field

Unit Sector

Common

Elements and Performance Criteria

Elements describe the essential outcomes.	Performance criteria describe what needs to be done to demonstrate achievement of the element.
1. Collate information required for processing client documentation.	1.1 Confirm client contact details. 1.2 Confirm details of products and services supplied to client and verify quoted prices. 1.3 Record time spent in providing service to client. 1.4 Confirm guarantees or warranty arrangements for products and services.

	1.5 Check terms of client payment. 1.6 Check discrepancies between costs quoted to client and actual cost of products and services, and undertake required follow-up to collect shortfall.
2. Process client documentation.	2.1 Prepare documentation containing complete details of product or service provided. 2.2 Calculate cost of providing product or service, and record price in client documentation. 2.3 Check documentation for accuracy and amend as necessary prior to providing to client. 2.4 Provide and explain documentation to client, including advice on follow-up service if required. 2.5 Maintain privacy and confidentiality of client information and documentation.
3. Finalise client documentation process.	3.1 Address client queries or complaints. 3.2 Collect payments from client and issue receipts.

Foundation Skills

This section describes the language, literacy, numeracy and employment skills essential to performance in this unit but not explicit in the performance criteria:

- reading skills to review and check:
 - client details
 - products and services documentation
 - guarantees and warranties
- writing skills to prepare client documentation
- numeracy skills to use methods and tools to calculate and check price of products and services provided for clients.

Range of Conditions

Not applicable

Unit Mapping Information

Supersedes and is equivalent to CPPCMN3005A Complete client documentation.

Links

Companion volumes to this training package are available at the VETNet website -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=6f3f9672-30e8-4835-b348-205dfcf13d9b>

Assessment Requirements for CPPCMN3005 Complete client documentation

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Performance Evidence

To demonstrate competency in this unit, a person must complete client documentation for two different property services industry clients.

In doing this, the person must meet the performance criteria for this unit.

Knowledge Evidence

To be competent in this unit, a person must demonstrate knowledge of:

- workplace procedures for completing property services industry client documentation
- requirements of legislation, regulations, Australian standards and codes of practice relevant to client interaction, including those related to:
 - confidentiality
 - consumer protection
 - privacy
- work health and safety (WHS)
- client documentation, including:
 - types of client documentation and standard forms used in the relevant property services industry sector
 - consequences of providing incomplete or inaccurate client documentation
 - details required for completing client documentation
 - importance of accuracy in completing client documentation
 - procedures for explaining documentation to client
- customer service principles
- procedures for processing different methods of payment
- operation and maintenance of equipment required for electronic processing of client documentation, including:
 - calculator
 - EFTPOS machine
 - electronic tablet
 - computer

- scanner
- printer.

Assessment Conditions

Assessors must satisfy the requirements for assessors contained in the Standards for Registered Training Organisations.

Assessment of performance must be undertaken in the workplace or in a simulated workplace environment. Tasks are to be performed to the level of proficiency and within the time limits expected in a workplace.

Assessors are responsible for ensuring that the person demonstrating competency has access to:

- work site/s and specifications to complete client documentation
- standard format or template for client documentation
- specifications for the product or service provided to client
- fee schedule for products and services
- relevant workplace policies and procedures.

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