



Australian Government

CPPCMN3005A Complete client documentation

Release: 1

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Modification History

Version	Comments
1	This version first released with CPP07 Property Services Training Package Version 13.

Unit Descriptor

This unit of competency specifies the outcomes required to complete client documentation commonly used or issued within the swimming pool and spa servicing industry. It includes gathering and verifying information required to complete client documentation, processing client documentation, and minimising waste by using electronic document processing.

Application of the Unit

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

Licensing/Regulatory Information

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

Pre-Requisites

Nil

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the required performance needed to demonstrate achievement of the element. Where ***bold italicised*** text is used, further information is detailed in the required skills and knowledge and/or the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

1	Collate information required for processing client documentation.	1.1	<i>Client details</i> are confirmed in line with enterprise procedures.
		1.2	Details of <i>products and services</i> supplied to client are confirmed and prices quoted are checked in line with enterprise procedures.
		1.3	Time spent in providing service to client is recorded in line with enterprise procedures, if required.
		1.4	Guarantees or warranty arrangements for products and services are confirmed in line with enterprise procedures.
		1.5	Payment status is checked and appropriate action is taken in line with enterprise procedures.
		1.6	Discrepancies in costs quoted to client and actual cost of products and services are checked and reported to appropriate persons and follow-up action required to collect shortfall is taken in line with enterprise procedures.
2	Process documentation.	2.1	<i>Documentation</i> containing <i>complete details</i> is prepared in line with enterprise procedures.
		2.2	Appropriate calculations are made and required costs are recorded in documentation in line with enterprise procedures.
		2.3	Documentation is checked for accuracy and amended as necessary prior to providing to client, in line with enterprise procedures.

- 2.4 Documentation is provided and explained to client, including advice on follow-up service, in line with enterprise procedures.
- 2.5 Client queries or complaints are dealt with in line with enterprise procedures.
- 2.6 **Payments** are collected from clients and receipts are issued in line with enterprise procedures, as required.
- 2.7 **Copies of documents** are processed in line with enterprise procedures.
- 2.8 Privacy and confidentiality of client information and documentation are observed in line with enterprise and legislative requirements.

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| 3 | Minimise waste of printed materials. | 3.1 | Electronic means of completing, transmitting and filing client documentation are used to reduce waste and negative environmental impacts, as appropriate. |
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Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to interact in an ethical manner with clients from diverse social, economic and cultural backgrounds
- decision-making and problem-solving skills to identify appropriate information for inclusion in client documentation, including advice on recommended follow-up actions
- literacy skills to read, interpret and complete client documentation
- numeracy skills to perform basic calculations required to complete client documentation
- research skills to identify and locate information on cost of products and services
- technology skills to use electronic means of completing, filing and transmitting client documentation

Required knowledge

- commonwealth, state or territory, and local government legislation and regulations, Australian standards, and codes of practice impacting on client documentation related to:
 - confidentiality
 - consumer protection
 - privacy
 - work health and safety
- client documentation:
 - consequences of providing incomplete or inaccurate client documentation
 - details required for completion of client documentation
 - importance of accuracy in completing client documentation
 - procedures for explaining documentation to client
 - standard forms used in the industry
 - variety of client documentation
- customer service principles
- methods of payment
- operation and maintenance of equipment for electronic processing of client documentation:
 - calculator
 - EFTPOS / credit card machine

- electronic tablet
- laptop computer
- scanner
- swimming pool and spa product and service knowledge

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment	This unit of competency could be assessed by demonstration of completion of client documentation associated with servicing swimming pools and spas.
Critical aspects for assessment and evidence required to demonstrate competency in this unit	A person should demonstrate the ability to: • collate information required for completion of client documentation related to swimming pool or spa servicing • calculate the costs of providing products and services in order to complete client documentation • process client documentation related to swimming pool or spa servicing • check client documentation for accuracy • present and explain documentation to client • respond to client queries and complaints with regard to documentation • file client documentation • demonstrate knowledge of: • types and purpose of client documentation • details required to complete different types of client documentation • importance of accurately completing client documentation.
Context of and specific resources for assessment	Assessment of essential underpinning knowledge may be conducted in an off-site context and is to comply with relevant regulatory and Australian standards' requirements. Resource implications for assessment include: • relevant codes, standards and government regulations • a technical reference library with current publications on: • swimming pool and spa products and services • client documentation • customer service principles.
Method of assessment	Assessment methods must: • satisfy the endorsed Assessment Guidelines of the CPP07 Property Services Training Package • include direct observation of tasks in real or simulated work conditions, with questioning to confirm the ability to consistently identify and correctly interpret the essential underpinning

	knowledge required for practical application - reinforce the integration of employability skills with workplace tasks and job roles - confirm that competency is verified and able to be transferred to other circumstances and environments. This unit could be assessed on its own or in combination with other units relevant to the job function.
Guidance information for assessment	Reasonable adjustments for people with disabilities must be made to assessment processes where required. This could include access to modified equipment and other physical resources, and the provision of appropriate assessment support. Assessment processes and techniques should, as far as is practical, take into account the language, literacy and numeracy capacity of the candidate in relation to the competency being assessed.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. ***Bold italicised*** wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

<i>Client details</i> may include:	- address of client's property - client billing address - client email address - date product or service provided - name of client - nature of product or service required - telephone number of client.
<i>Products and services</i> may include:	- service and/or repair of swimming pool or spa - swimming pool and spa: - accessories - chemicals - components - technical advice on swimming pool or spa.
<i>Documentation</i> may include:	- checklist - company information - electronic documentation - guarantees or warranty information

	• paper documentation • product information • quotation • receipt • risk mitigation • service information • specific documentation for commercial and public swimming pools and spas • tax invoice.
Complete details may include:	• Australian Business Number • call-out charges • contact details for company • date of supply of product and service • delivery charges • delivery details • description of product or service provided • discounts • Goods and Services Tax • guarantee or warranty details • labour cost • materials: • cost • description • product code numbers • quantity • name of staff member who provided product or service • recommended follow-up actions • tax invoice number • time spent providing product or service.
Payments may include:	• account • cash • cheque • credit card • EFTPOS.
Copies of documents may be:	• for follow-up action • for supplier • for the accounts department • for the file • paper-based or electronically transmitted materials.

Unit Sector(s)

Competency field

Unit sector Swimming pools and spas

Custom Content Section

Not applicable.