



# QUALIFICATIONS PACK – NATIONAL OCCUPATIONAL STANDARDS FOR IT-BPM INDUSTRY

## What are National Occupational Standards (NOS)?

- NOS describe what individuals need to do, know and understand in order to carry out a particular job role or function
- NOS are performance standards that individuals must achieve when carrying out functions in the workplace, together with specifications of the underpinning knowledge and understanding

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## Introduction

### Qualifications Pack-Associate - Transactional F&A

**SECTOR:** IT-ITeS

**SUB-SECTOR:** Business Process Management

**OCCUPATION:** Finance and Accounting

**REFERENCE ID:** SSC/Q2301

**ALIGNED TO:** NCO-2015/2411.0101

**Associate - Transactional F&A** in the IT-ITeS Industry is also known as a Finance Coordinator, Accounts Coordinator, Accounts Executive etc.

**Brief Job Description:** Individuals at this job are responsible for financial activities that are largely simple and transactional in nature. They are responsible for systematic and timely recording, reporting, and analysis of financial transactions of a business.

**Personal Attributes:** This job requires the individual to follow detailed instructions and procedures with an eye for detail. The individual should be analytical and result oriented and should demonstrate logical thinking.



<b>Job Details</b>	<b>Qualifications Pack Code</b>	<b>SSC/Q2301</b>		
	<b>Job Role</b>	<b>Associate - Transactional F&amp;A</b> This job role is applicable in both national and international scenarios		
	<b>Credits (NSQF)</b>	<b>TBD</b>	<b>Version number</b>	<b>1.0</b>
	<b>Sector</b>	<b>IT-ITes</b>	<b>Drafted on</b>	<b>30/04/2013</b>
	<b>Sub-sector</b>	<b>Business Process Management</b>	<b>Last reviewed on</b>	<b>31/03/2018</b>
	<b>Occupation</b>	<b>Finance and Accounting</b>	<b>Next review date</b>	<b>31/03/2019</b>
	<b>NSQC Clearance on</b>	<b>20/07/2015</b>		

<b>Job Role</b>	<b>Associate - Transactional F&amp;A</b> (Finance Coordinator, Accounts Coordinator, Accounts Executive)
<b>Role Description</b>	Individuals at this job support are responsible for systematic and timely recording, reporting, and analysis of financial transactions of a business.
<b>NSQF level</b>	7
<b>Minimum Educational Qualifications</b>	Bachelor's Degree in commerce/ economics
<b>Maximum Educational Qualifications</b>	Master's Degree in Commerce/Accounts/Finance and/or / CA Inter/CA/ ICWA/MBA Tier
<b>Training</b> (Suggested but not mandatory)	Certifications/courses/trainings on MS-Office (PowerPoint, Excel), Accounting standards etc.
<b>Minimum Job Entry Age</b>	18 years
<b>Experience</b>	0-2 years of work experience/internship in accounts payable/receivables roles
<b>Applicable National Occupational Standards (NOS)</b>	<p><b>Compulsory:</b></p> <ol style="list-style-type: none"> <li><a href="#">SSC/N2302 (Process invoices, credit notes and claims)</a></li> <li><a href="#">SSC/N2303 (Pay invoices and claims)</a></li> <li><a href="#">SSC/N2304 (Deal with queries at the accounts payable helpdesk)</a></li> <li><a href="#">SSC/N2305 (Maintain customer accounts)</a></li> <li><a href="#">SSC/N2306 (Generate invoices and credit notes)</a></li> <li><a href="#">SSC/N2307 (Receive payments and apply cash)</a></li> <li><a href="#">SSC/N2309 (Deal with queries at the accounts receivable helpdesk)</a></li> <li><a href="#">SSC/N9001 (Manage your work to meet requirements)</a></li> <li><a href="#">SSC/N9002 (Work effectively with colleagues)</a></li> <li><a href="#">SSC/N9003 (Maintain a healthy, safe and secure working environment)</a></li> <li><a href="#">SSC/N9004 (Provide data/information in standard formats)</a></li> <li><a href="#">SSC/N9005 (Develop your knowledge, skills and competence)</a></li> </ol> <p><b>Optional:</b> Not Applicable</p>
<b>Performance Criteria</b>	As described in the relevant NOS units

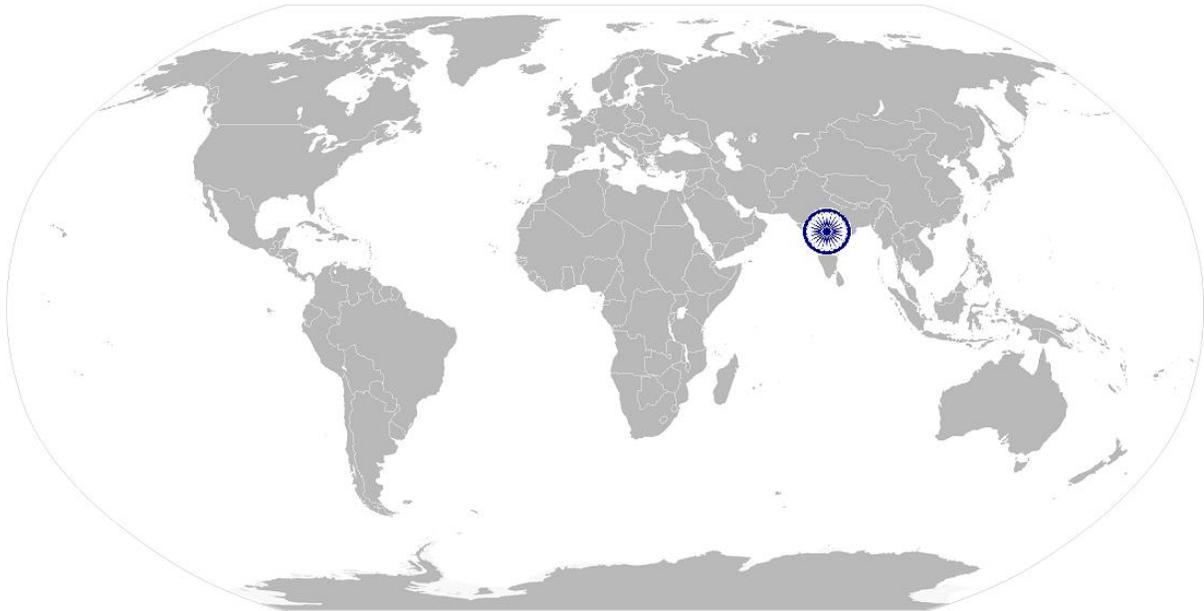
Definitions	Keywords /Terms	Description
	Sector	Sector is a conglomeration of different business operations having similar businesses and interests. It may also be defined as a distinct subset of the economy whose components share similar characteristics and interests.
	Sub-sector	Sub-sector is derived from a further breakdown based on the characteristics and interests of its components.
	Vertical	Vertical may exist within a sub-sector representing different domain areas or the client industries served by the industry.
	Occupation	Occupation is a set of job roles, which perform similar/related set of functions in an industry.
	Function	Function is an activity necessary for achieving the key purpose of the sector, occupation, or area of work, which can be carried out by a person or a group of persons. Functions are identified through functional analysis and form the basis of OS.
	Sub-functions	Sub-functions are sub-activities essential to fulfill the achieving the objectives of the function.
	Job role	Job role defines a unique set of functions that together form a unique employment opportunity in an organisation.
	Occupational Standards (OS)	OS specify the standards of performance an individual must achieve when carrying out a function in the workplace, together with the knowledge and understanding they need to meet that standard consistently. Occupational Standards are applicable both in the Indian and global contexts.
	Performance Criteria	Performance Criteria are statements that together specify the standard of performance required when carrying out a task.
	National Occupational Standards (NOS)	NOS are Occupational Standards which apply uniquely in the Indian context.
	Qualifications Pack Code	Qualifications Pack Code is a unique reference code that identifies a qualifications pack.
	Qualifications Pack(QP)	Qualifications Pack comprises the set of OS, together with the educational, training and other criteria required to perform a job role. A Qualifications Pack is assigned a unique qualification pack code.
Unit Code	Unit Code is a unique identifier for an OS unit, which can be denoted with either an 'O' or an 'N'.	
Unit Title	Unit Title gives a clear overall statement about what the incumbent should be able to do.	



Description	Description gives a short summary of the unit content. This would be helpful to anyone searching on a database to verify that this is the appropriate OS they are looking for.
Scope	Scope is the set of statements specifying the range of variables that an individual may have to deal with in carrying out the function which have a critical impact on the quality of performance required.
Knowledge and Understanding	Knowledge and Understanding are statements which together specify the technical, generic, professional and organisational specific knowledge that an individual needs in order to perform to the required standard.
Organisational Context	Organisational Context includes the way the organisation is structured and how it operates, including the extent of operative knowledge managers have of their relevant areas of responsibility.
Technical Knowledge	Technical Knowledge is the specific knowledge needed to accomplish specific designated responsibilities.
Core Skills/Generic Skills	Core Skills or Generic Skills are a group of skills that are key to learning and working in today's world. These skills are typically needed in any work environment. In the context of the OS, these include communication related skills that are applicable to most job roles.
Helpdesk	Helpdesk is an entity to which the customers will report their IT problems. IT Service Helpdesk Attendant is responsible for managing the helpdesk.

Acronyms	Keywords /Terms	Description
	IT-ITeS	Information Technology - Information Technology enabled Services
BPM	Business Process Management	
BPO	Business Process Outsourcing	
KPO	Knowledge Process Outsourcing	
LPO	Legal Process Outsourcing	
IPO	Information Process Outsourcing	
BCA	Bachelor of Computer Applications	
B.Sc.	Bachelor of Science	
OS	Occupational Standard(s)	
NOS	National Occupational Standard(s)	
QP	Qualifications Pack	
UGC	University Grants Commission	
MHRD	Ministry of Human Resource Development	
MoLE	Ministry of Labour and Employment	
NVEQF	National Vocational Education Qualifications Framework	
NVQF	National Vocational Qualifications Framework	
NSQF	National Skill Qualification Framework	

# National Occupational Standard



## Overview

This unit is about processing invoices and credit notes from vendors and travel and expenses claims from personnel/employees, as part of an outsourced finance and accounting process.

SSC/N2302

Process invoices, credit notes and claims

Applicable NOS Unit

Unit Code	SSC/N2302
Unit Title (Task)	Process invoices, credit notes and claims
Description	This unit is about processing invoices and credit notes from vendors and travel and expenses claims from personnel/employees, as part of an outsourced finance and accounting process.
Scope	<p>This unit/task covers the following:</p> <p><b>Codes:</b></p> <ul style="list-style-type: none"> <li>• cost centre codes</li> <li>• accounting codes</li> <li>• tax codes</li> </ul> <p><b>Appropriate people:</b></p> <ul style="list-style-type: none"> <li>• line manager</li> <li>• cost centre managers</li> <li>• subject matter experts</li> </ul>
<b>Performance Criteria (PC) w.r.t. the Scope</b>	
	<p>To be competent, you must be able to:</p> <p>PC1. check systems to verify whether invoices and claims have already been received and recorded</p> <p>PC2. validate invoices against purchase orders (POs) and/or other documentation received and assign appropriate <b>codes</b></p> <p>PC3. validate vendor credit notes against relevant invoices and assign appropriate <b>codes</b></p> <p>PC4. validate expense items against relevant expense policies and assign appropriate <b>codes</b></p> <p>PC5. identify any issues with invoices, credit notes and claims and clarify these with relevant vendors or personnel/employees</p> <p>PC6. enter invoices, credit notes and claims into your organization's systems, following your organization's policies, procedures, guidelines and client-specific SLAs</p> <p>PC7. check processing of invoices, credit notes and claims with peers and/or supervisor, as required</p> <p>PC8. submit entered invoices and claims for review and approval by <b>appropriate people</b></p> <p>PC9. update invoices and claims in your organization's systems in case of changes</p> <p>PC10. reconcile invoices, credit notes and claims against system entries on a periodic basis, as required</p> <p>PC11. obtain advice and guidance from <b>appropriate people</b>, where required</p>

SSC/N2302

**Process invoices, credit notes and claims**

	<p>PC12. comply with your organization’s policies, procedures, guidelines and client-specific SLAs when processing invoices, credit notes and claims</p>
<p><b>Knowledge and Understanding (K)</b></p>	
<p><b>A. Organizational Context</b> (Knowledge of the company/ organization and its processes)</p>	<p>You need to know and understand:</p> <p>KA1. your organization’s policies, procedures, guidelines and client specific SLAs for finance and accounting services, and your role in applying these</p> <p>KA2. your role and responsibilities and how these relate to end business goals</p> <p>KA3. your organization’s systems, tools and processes for recording and managing:</p> <ul style="list-style-type: none"> <li>• vendor invoices and credit notes</li> <li>• travel and expenses claims</li> <li>• upstream and downstream processes</li> </ul> <p>KA4. your organization’s procedures and the appropriate codes required for validating:</p> <ul style="list-style-type: none"> <li>• received invoices against purchase orders</li> <li>• vendor credit notes against invoices</li> <li>• expense items against expense policies</li> </ul> <p>KA5. legislation and regulations relating to accounting services</p> <p>KA6. the required timescales for invoices, credit notes and claims and the importance of complying with these</p> <p>KA7. data/information required to process invoices, credit notes and claims</p> <p>KA8. who to involve when checking and processing invoices and claims</p> <p>KA9. the purpose of verifying whether invoices/claims have already been received</p> <p>KA10. who to involve when submitting invoices and claims for review and approval</p> <p>KA11. your organization’s processes and guidelines for communicating with vendors and personnel/employees</p> <p>KA12. who to obtain advice and guidance from</p> <p>KA13. methods and techniques when working with others</p> <p>KA14. standard tools and templates available and how to access and use these</p> <p>KA15. your organization’s process for clarifying issues with vendors or personnel/employees</p> <p>KA16. your organization’s policies and procedures for recording and storing records, maintaining information security and protecting data and the importance of complying with these</p>
<p><b>B. Technical Knowledge</b></p>	<p>You need to know and understand:</p> <p>KB1. different codes and coding structures for cost centre’s, accounts and tax purposes and how to select the appropriate code</p> <p>KB2. common issues that may occur when validating and coding invoices, credit notes and claims and how to resolve these</p> <p>KB3. how accounting entries are used and the impact of inaccuracies</p>

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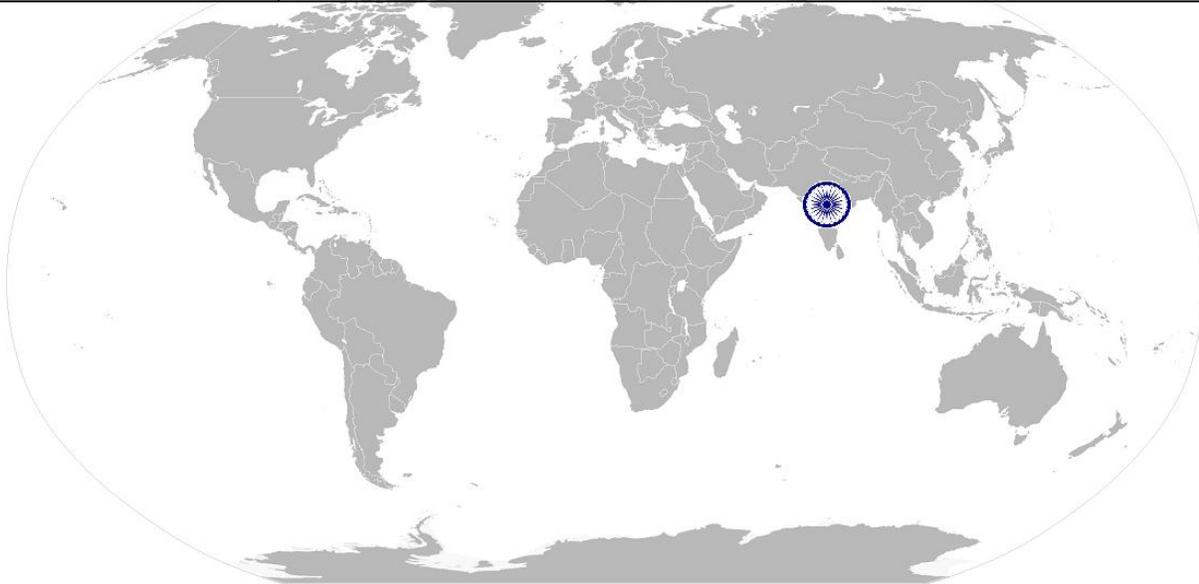
**Process invoices, credit notes and claims**

	KB4. the importance of reconciling invoices, credit notes and claims against system entries and how to do this	
<b>Skills (S)</b>		
<b>A. Core Skills/ Generic Skills</b>	<b>Writing Skills</b>	
	You need to know and understand how to: SA1. complete accurate well written work with attention to detail SA2. communicate with others in writing	
	<b>Reading Skills</b>	
	You need to know and understand how to: SA3. follow guidelines, procedures, rules and service level agreements	
	<b>Oral Communication (Listening and Speaking skills)</b>	
	You need to know and understand how to: SA4. listen effectively and orally communicate information accurately SA5. ask for clarification and advice from others	
	<b>B. Professional Skills</b>	<b>Decision Making</b>
		You need to know and understand how to: SB1. follow rule-based decision-making processes SB2. make a decision on a suitable course of action
		<b>Plan and Organize</b>
		You need to know and understand how to: SB3. plan and organize your work to achieve targets and deadlines
<b>Customer Centricity</b>		
You need to know and understand how to: SB4. carry out rule-based transactions in line with customer-specific guidelines, procedures, rules and service level agreements SB5. work effectively in a customer facing environment SB6. deliver consistent and reliable service to customers		
<b>Problem Solving</b>		
You need to know and understand how to: SB7. refer anomalies to the supervisor SB8. seek clarification on problems from others		
<b>Analytical Thinking</b>		
You need to know and understand how to: SB9. analyze data and activities SB10. pass on relevant information to others		
<b>Critical Thinking</b>		
You need to know and understand how to: SB11. apply balanced judgments to different situations		
<b>Attention to Detail</b>		

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Process invoices, credit notes and claims

	<p>You need to know and understand how to:</p> <p>SB12. check your work is complete and free from errors</p> <p>SB13. get your work checked by others</p>
	<p><b>Team Working</b></p> <p>You need to know and understand how to:</p> <p>SB14. contribute to the quality of team working</p> <p>SB15. work effectively in a team environment</p>
<p><b>C. Technical Skills</b></p>	<p>You need to know and understand how to:</p> <p>SC1. use information technology effectively to input and/or extract data accurately</p> <p>SC2. identify and refer anomalies in data</p> <p>SC3. store and retrieve information</p> <p>SC4. keep up to date with changes, procedures and practices in your role</p> <p>SC5. use software packages and tools specific to your field of expertise</p>



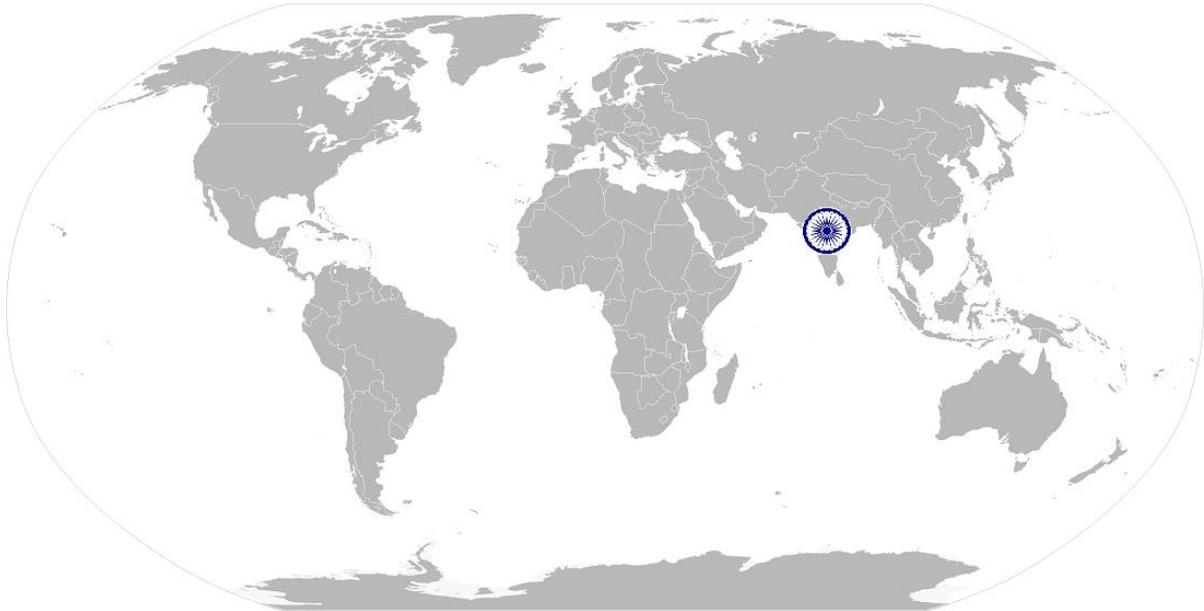
**SSC/N2302**  
**NOS Version Control**

**Process invoices, credit notes and claims**

<b>NOS Code</b>	<b>SSC/N2302</b>		
<b>Credits (NSQF) [OPTIONAL]</b>	<b>TBD</b>	<b>Version number</b>	<b>1.0</b>
<b>Industry</b>	<b>IT-ITeS</b>	<b>Drafted on</b>	<b>30/04/2013</b>
<b>Industry Sub-sector</b>	<b>Business Process Management</b>	<b>Last reviewed on</b>	<b>31/03/2018</b>
		<b>Next review date</b>	<b>31/03/2019</b>



# National Occupational Standard



## Overview

This unit is about making payments to vendors and personnel/employees following approval of invoices and travel and expenses claims, as part of an outsourced finance and accounting process.

SSC/N2303

Pay invoices and claims

Applicable NOS Unit

Unit Code	SSC/N2303
Unit Title (Task)	Pay invoices and claims
Description	This unit is about making payments to vendors and personnel/employees following approval of invoices and travel and expenses claims, as part of an outsourced finance and accounting process.
Scope	<p>This unit/task covers the following:</p> <p><b>Payment types:</b></p> <ul style="list-style-type: none"> <li>• wire payments</li> <li>• EFTs</li> <li>• BACs</li> <li>• ACHs</li> </ul> <p><b>Appropriate people:</b></p> <ul style="list-style-type: none"> <li>• line manager</li> <li>• cost centre managers</li> <li>• subject matter experts</li> </ul>
<b>Performance Criteria (PC) w.r.t. the Scope</b>	
	<p>To be competent, you must be able to:</p> <p>PC1. check systems to verify whether approved invoices and claims have already been paid</p> <p>PC2. carry out random checks on approved invoices and claims, as required</p> <p>PC3. identify any issues with approved invoices and claims and clarify these with <b>appropriate people</b></p> <p>PC4. prepare batches of invoices and claims for pay-run , following your organization's policies, procedures, guidelines and client-specific SLAs</p> <p>PC5. check pay-run with peers and/or supervisor, as required</p> <p>PC6. submit pay-run for review and approval by <b>appropriate people</b></p> <p>PC7. respond promptly to payment queries from vendors and personnel/ employees referred by the accounts payable helpdesk</p> <p>PC8. reconcile payments against bank statements on a periodic basis, as required</p> <p>PC9. liaise effectively with banks regarding any queries about reconciliation or non-receipt of authorized payments</p> <p>PC10. obtain advice and guidance from <b>appropriate people</b>, where required</p> <p>PC11. comply with your organization's policies, procedures, guidelines and client-specific SLAs when paying invoices and claims</p>
<b>Knowledge and Understanding (K)</b>	
<b>A. Organizational Context</b> (Knowledge of the	<p>You need to know and understand:</p> <p>KA1. your organization's policies, procedures, guidelines and client specific SLAs for invoice and claims payments and your role in applying these</p>

SSC/N2303

Pay invoices and claims

<p>company/ organization and its processes)</p>	<p>KA2. your organization's systems, tools and processes for recording and paying vendor invoices and travel/expenses claims</p> <p>KA3. your organization's procedures and processes for preparing, submitting and approving pay-run</p> <p>KA4. data/information required to process invoices and claims</p> <p>KA5. who to involve when preparing, checking and submitting pay-run</p> <p>KA6. different payment types used by your organization</p> <p>KA7. your organization's processes and guidelines for communicating with banks</p> <p>KA8. the importance of reconciling payments against bank statements periodically and how to do this</p> <p>KA9. the purpose and importance of payment terms for invoices and claims</p> <p>KA10. how to identify the required timescales for invoices and claims and the importance of complying with these</p> <p>KA11. the importance of checking pay-run with others</p> <p>KA12. how to clarify identified issues and who to seek guidance from to resolve these</p> <p>KA13. your organization's products and services and those of competitors</p> <p>KA14. who to obtain advice and guidance from</p> <p>KA15. methods and techniques when working with others</p> <p>KA16. standard tools and templates available and how to access and use these</p> <p>KA17. your organization's policies and procedures for recording and storing records, maintaining information security and protecting data and the importance of complying with these</p>
<p><b>B. Technical Knowledge</b></p>	<p>You need to know and understand:</p> <p>KB1. common issues that may arise with approved invoices and travel and expenses claims and how to resolve these</p> <p>KB2. different codes, coding structures and code blocks for vendors, cost centre's, accounts and tax purposes and how to select appropriate codes</p> <p>KB3. how to prepare batches of invoices and claims for pay-run</p> <p>KB4. types of queries referred from the accounts payable helpdesk and the standard responses to these</p> <p>KB5. types of queries about reconciliation and non-receipt of payments that may arise and how to address these</p> <p>KB6. the impact of wrong and delayed payments and how to handle exceptions</p> <p>KB7. how recording the causes of payment errors and delays can improve future performance and how to do so</p>
<p><b>Skills (S)</b></p>	
	<p><b>Writing Skills</b></p> <p>You need to know and understand how to:</p>

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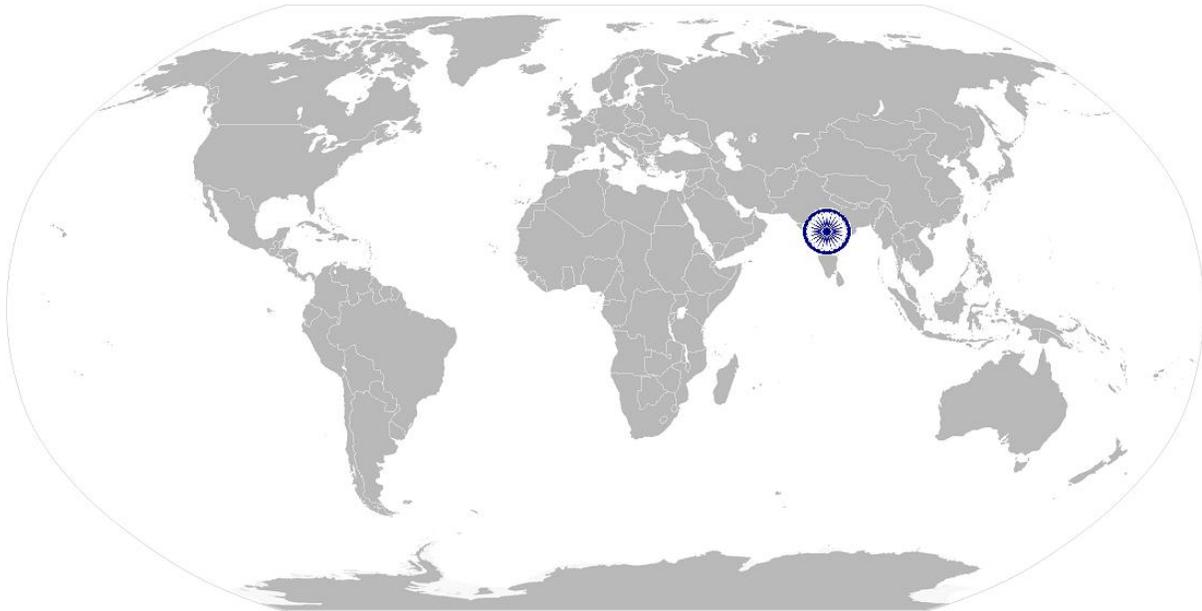
**Pay invoices and claims**

<b>A. Core Skills/ Generic Skills</b>	SA1. complete accurate well written work with attention to detail SA2. communicate with others in writing
	<b>Reading Skills</b>
	You need to know and understand how to: SA3. follow guidelines, procedures, rules and service level agreements
	<b>Oral Communication (Listening and Speaking skills)</b>
	You need to know and understand how to: SA4. listen effectively and orally communicate information accurately SA5. ask for clarification and advice from others
<b>B. Professional Skills</b>	<b>Decision Making</b>
	You need to know and understand how to: SB1. follow rule-based decision-making processes SB2. make a decision on a suitable course of action
	<b>Plan and Organize</b>
	You need to know and understand how to: SB3. plan and organize your work to achieve targets and deadlines
	<b>Customer Centricity</b>
	You need to know and understand how to: SB4. carry out rule-based transactions in line with customer-specific guidelines, procedures, rules and service level agreements SB5. work effectively in a customer facing environment SB6. deliver consistent and reliable service to customers
	<b>Problem Solving</b>
	You need to know and understand how to: SB7. refer anomalies to the supervisor SB8. seek clarification on problems from others
	<b>Analytical Thinking</b>
	You need to know and understand how to: SB9. analyze data and activities SB10. pass on relevant information to others
	<b>Critical Thinking</b>
	You need to know and understand how to: SB11. apply balanced judgments to different situations
	<b>Attention to Detail</b>
	You need to know and understand how to: SB12. check your work is complete and free from errors SB13. get your work checked by others
<b>Team Working</b>	
You need to know and understand how to:	

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Pay invoices and claims

	<p>SB14. contribute to the quality of team working</p> <p>SB15. work effectively in a team environment</p>
<b>C. Technical Skills</b>	<p>You need to know and understand how to:</p> <p>SC1. use information technology effectively to input and/or extract data accurately</p> <p>SC2. identify and refer anomalies in data</p> <p>SC3. store and retrieve information</p> <p>SC4. keep up to date with changes, procedures and practices in your role</p> <p>SC5. use software packages and tools specific to your field of expertise</p>



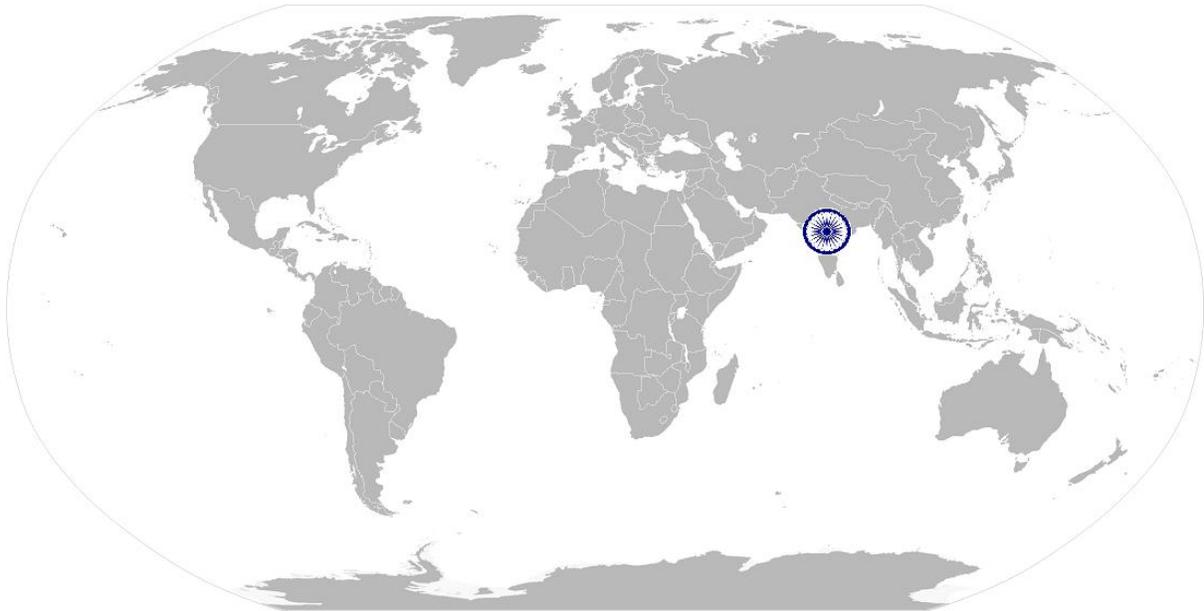
**SSC/N2303**  
**NOS Version Control**

**Pay invoices and claims**

<b>NOS Code</b>	<b>SSC/N2303</b>		
<b>Credits (NSQF) [OPTIONAL]</b>	<b>TBD</b>	<b>Version number</b>	<b>1.0</b>
<b>Industry</b>	<b>IT-ITeS</b>	<b>Drafted on</b>	<b>30/04/2013</b>
<b>Industry Sub-sector</b>	<b>Business Process Management</b>	<b>Last reviewed on</b>	<b>31/03/2018</b>
		<b>Next review date</b>	<b>31/03/2019</b>



# National Occupational Standard



## Overview

This unit is about dealing with queries received from vendors or personnel/ employees relating to invoices or claims they have submitted.

SSC/N2304

Deal with queries at the accounts payable helpdesk

Applicable NOS Unit

Unit Code	SSC/N2304
Unit Title (Task)	Deal with queries at the accounts payable helpdesk
Description	This unit is about dealing with queries received from vendors or personnel/ employees relating to invoices or claims they have submitted.
Scope	<p>This unit/task covers the following:</p> <p><b>Helpdesk users:</b></p> <ul style="list-style-type: none"> <li>• vendors</li> <li>• personnel/employees</li> </ul> <p><b>Queries received by:</b></p> <ul style="list-style-type: none"> <li>• telephone</li> <li>• e-mail</li> <li>• chat</li> </ul> <p><b>Appropriate people:</b></p> <ul style="list-style-type: none"> <li>• supervisor</li> <li>• members of the accounts payable team</li> <li>• subject matter experts</li> </ul>
<b>Performance Criteria (PC) w.r.t. the Scope</b>	
	<p>To be competent, you must be able to:</p> <p>PC1. greet helpdesk users and verify their details, following your organization's procedures</p> <p>PC2. listen carefully to <b>helpdesk users</b> and ask appropriate questions to understand the nature of their queries</p> <p>PC3. summarize and obtain confirmation from <b>helpdesk users</b> of your understanding of their queries</p> <p>PC4. express your concern for any difficulties caused and your commitment to resolving their queries</p> <p>PC5. record and categorize queries accurately using your organization's query management tool</p> <p>PC6. obtain relevant information from the accounts payable system and communicate this information clearly to <b>helpdesk users</b></p> <p>PC7. refer queries that cannot be dealt with by reference to the accounts payable system promptly to <b>appropriate people</b></p> <p>PC8. provide <b>helpdesk users</b> with a justifiable estimate of time to respond to their queries, where an immediate response cannot be given</p> <p>PC9. monitor resolution of queries to keep <b>helpdesk users</b> informed about progress and any delays in resolving their queries</p> <p>PC10. obtain confirmation from <b>helpdesk users</b> that their queries have been resolved to their satisfaction</p> <p>PC11. record the resolution of queries accurately using your organization's query management tool</p>

SSC/N2304

**Deal with queries at the accounts payable helpdesk**

	<p>PC12. comply with relevant standards, policies, procedures, guidelines and service level agreements (SLAs) when dealing with queries at the accounts payable helpdesk</p>
<p><b>Knowledge and Understanding (K)</b></p>	
<p><b>A. Organizational Context</b> (Knowledge of the company/ organization and its processes)</p>	<p>You need to know and understand:</p> <p>KA1. your organization's standards, policies, procedures, guidelines and service level agreements (SLAs) for dealing with accounts receivable queries and your role in applying these</p> <p>KA2. your organization's guidelines and protocols for communicating with helpdesk users</p> <p>KA3. your organization's query management tool for recording and monitoring queries and how to use this</p> <p>KA4. your organizations systems and tools for recording historical queries and how to access this to identify solutions</p> <p>KA5. your organization's accounts payable system and how to use this</p> <p>KA6. limits of your role and responsibilities in relation to accounts receivable queries</p> <p>KA7. types of financial information required from helpdesk users to make payment and how to obtain this</p> <p>KA8. typical timescales for dealing with queries and the importance of complying with these</p> <p>KA9. your organization's terms of payment and when these can be negotiated</p> <p>KA10. the importance of keeping helpdesk users informed about timescales for progress and resolution of their query</p> <p>KA11. typical response times for helpdesk queries and the circumstances in which these may be exceeded</p> <p>KA12. the importance of confirming resolution of queries to helpdesk users satisfaction</p> <p>KA13. your organization's processes and procedures for reporting and handling exceptions and your role in applying these</p> <p>KA14. who to seek advice and guidance from</p> <p>KA15. methods and techniques used when working with helpdesk users</p> <p>KA16. standard tools, templates and scripts available for dealing with queries and how to access and use these</p> <p>KA17. your organization's policies and procedures for recording and storing records, maintaining information security and protecting data, and the importance of complying with these</p>
<p><b>B. Technical Knowledge</b></p>	<p>You need to know and understand:</p> <p>KB1. different styles and approaches when working with helpdesk users</p> <p>KB2. techniques for conveying concern and commitment</p>

**Deal with queries at the accounts payable helpdesk**

	<p>KB3. different questioning techniques for understanding queries</p> <p>KB4. the importance of summarizing and confirming understanding of queries</p> <p>KB5. common types of queries and how to resolve them</p> <p>KB6. the importance of timely payment from customers and techniques to achieve and confirm this</p> <p>KB7. issues that may affect helpdesk users satisfaction and how to deal with these</p> <p>KB8. current practice in customer service</p>
<b>Skills (S)</b>	
<b>A. Core Skills/ Generic Skills</b>	<p><b>Writing Skills</b></p> <p>You need to know and understand how to:</p> <p>SA1. complete accurate well written work with attention to detail</p> <p>SA2. communicate with others in writing</p> <p><b>Reading Skills</b></p> <p>You need to know and understand how to:</p> <p>SA3. follow instructions, guidelines, procedures, rules and service level agreements</p> <p><b>Oral Communication (Listening and Speaking skills)</b></p> <p>You need to know and understand how to:</p> <p>SA4. listen effectively and orally communicate information accurately</p> <p>SA5. ask for clarification and advice from others</p> <p>SA6. communicate orally with colleagues regarding queries</p>
<b>B. Professional Skills</b>	<p><b>Decision Making</b></p> <p>You need to know and understand how to:</p> <p>SB1. identify anomalies in data</p> <p>SB2. follow rule-based decision-making processes</p> <p>SB3. make a decision on a suitable course of action</p> <p><b>Plan and Organize</b></p> <p>You need to know and understand how to:</p> <p>SB4. plan and organize your work to achieve targets and deadlines</p> <p><b>Customer Centricity</b></p> <p>You need to know and understand how to:</p> <p>SB5. carry out rule-based transactions in line with customer-specific guidelines, procedures, rules and service level agreements</p> <p>SB6. check that your own and/or your peers work meets customer requirements</p> <p>SB7. deliver consistent and reliable service to customers</p> <p>SB8. work effectively in a customer facing environment</p> <p>SB9. build and maintain positive and effective relationships with customers</p> <p><b>Problem Solving</b></p> <p>You need to know and understand how to:</p> <p>SB10. seek clarification on problems from others</p>

**Deal with queries at the accounts payable helpdesk**

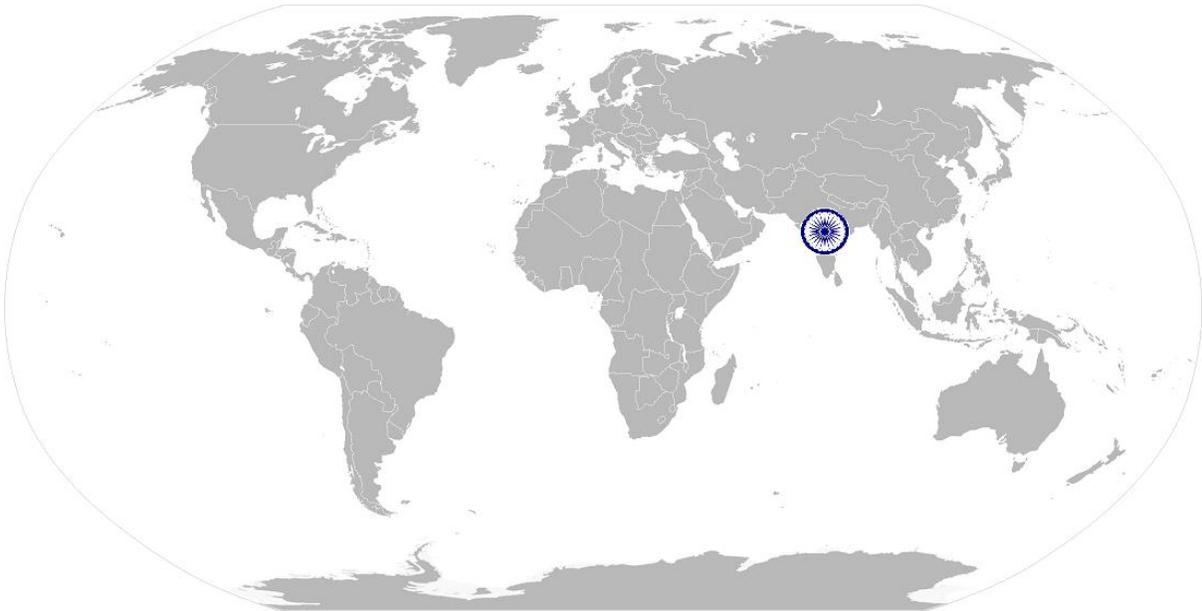
	SB11. apply problem-solving approaches in different situations
	<b>Analytical Thinking</b>
	You need to know and understand how to: SB12. analyze data and activities SB13. pass on relevant information to others
	<b>Critical Thinking</b>
	You need to know and understand how to: SB14. apply balanced judgments to different situations
	<b>Attention to Detail</b>
	You need to know and understand how to: SB15. check your work is complete and free from errors
	<b>Team Working</b>
You need to know and understand how to: SB16. work effectively in a team environment SB17. contribute to the quality of team working SB18. work independently and collaboratively	
<b>C. Technical Skills</b>	You need to know and understand how to: SC1. use information technology effectively to input and/or extract data accurately SC2. store and retrieve information SC3. agree objectives and work requirements SC4. keep up to date with changes, procedures and practices in your role

**Deal with queries at the accounts payable helpdesk**

<b>NOS Code</b>	<b>SSC/N2304</b>		
<b>Credits (NSQF) [OPTIONAL]</b>	<b>TBD</b>	<b>Version number</b>	<b>1.0</b>
<b>Industry</b>	<b>IT-ITeS</b>	<b>Drafted on</b>	<b>30/04/2013</b>
<b>Industry Sub-sector</b>	<b>Business Process Management</b>	<b>Last reviewed on</b>	<b>31/03/2018</b>
		<b>Next review date</b>	<b>31/03/2019</b>



# National Occupational Standard



## Overview

This unit is about setting up customer accounts and keeping them up-to-date, as part of an outsourced finance and accounting process.

**Maintain customer accounts**

Applicable NOS Unit	<b>Unit Code</b>	SSC/N2305
	<b>Unit Title (Task)</b>	Maintain customer accounts
	<b>Description</b>	This unit is about setting up customer accounts and keeping them up-to-date, as part of an outsourced finance and accounting process.
	<b>Scope</b>	<p>This unit/task covers the following:</p> <p><b>Appropriate sources:</b></p> <ul style="list-style-type: none"> <li>• contracts</li> <li>• supporting documentation</li> <li>• service level agreements (SLAs)</li> <li>• sales team</li> <li>• customers</li> <li>• client account manager</li> <li>• clients</li> </ul> <p><b>Credit checks using:</b></p> <ul style="list-style-type: none"> <li>• internal sources</li> <li>• external agencies</li> </ul> <p><b>Appropriate people:</b></p> <ul style="list-style-type: none"> <li>• line manager</li> <li>• sales team</li> <li>• taxation specialists</li> <li>• legal specialists</li> </ul> 
<b>Performance Criteria (PC) w.r.t. the Scope</b>		
	<p>To be competent, you must be able to:</p> <p>PC1. check systems to verify whether master records of customers already exist</p> <p>PC2. obtain required data/information from <b>appropriate sources</b> to set up and update customer accounts</p> <p>PC3. clarify any issues with the data/information either from the sales team or directly with customers, as required</p> <p>PC4. carry out <b>credit checks</b> on customers, following your organization's procedures, guidelines and client-specific service level agreements (SLAs)</p> <p>PC5. set up and update customer accounts, following your organization's procedures, guidelines and client-specific service level agreements (SLAs)</p> <p>PC6. obtain confirmation from customers that the details held in their master records are correct</p> <p>PC7. obtain advice and guidance from <b>appropriate people</b>, where required</p>	

**Maintain customer accounts**

	PC8. comply with your organization's policies, procedures, guidelines and client-specific SLAs when maintaining customer accounts
<b>Knowledge and Understanding (K)</b>	
<b>A. Organizational Context</b> (Knowledge of the company/ organization and its processes)	<p>You need to know and understand:</p> <p>KA1. your organization's policies, procedures, guidelines and client specific SLAs for maintaining customer accounts and your role in relation to these</p> <p>KA2. your organization's systems and tools for managing customer accounts and how to use these</p> <p>KA3. your organization's processes, guidelines and client specific SLA for carrying out credit checks and your role in applying these</p> <p>KA4. legislative requirements for carrying out credit checks</p> <p>KA5. your organization's policies and procedures for recording and sharing information and the importance of complying with these</p> <p>KA6. data/information required to set up and update customer accounts</p> <p>KA7. appropriate sources of data/information for customer accounts and how to access these</p> <p>KA8. who to involve when setting up or updating customer accounts</p> <p>KA9. who to obtain advice and guidance from</p> <p>KA10. methods and techniques when working with others</p> <p>KA11. standard tools and templates available for use and how to access and use these</p> <p>KA12. the importance of confirming details within master records with the customer</p> <p>KA13. your organization's policies and procedures for recording and storing records, maintaining information security and protecting data and the importance of complying with these</p>
<b>B. Technical Knowledge</b>	<p>You need to know and understand:</p> <p>KB1. common issues with customer information and how to resolve these</p> <p>KB2. the purpose of carrying out credit checks on customers and how to do so</p>
<b>Skills (S)</b>	
<b>A. Core Skills/ Generic Skills</b>	<b>Writing Skills</b>
	You need to know and understand how to:
	SA1. complete accurate well written work with attention to detail
	SA2. communicate with others in writing
	<b>Reading Skills</b>
You need to know and understand how to:	
SA3. follow guidelines, procedures, rules and service level agreements	
<b>Oral Communication (Listening and Speaking skills)</b>	
You need to know and understand how to:	
SA4. listen effectively and orally communicate information accurately	
SA5. ask for clarification and advice from others	

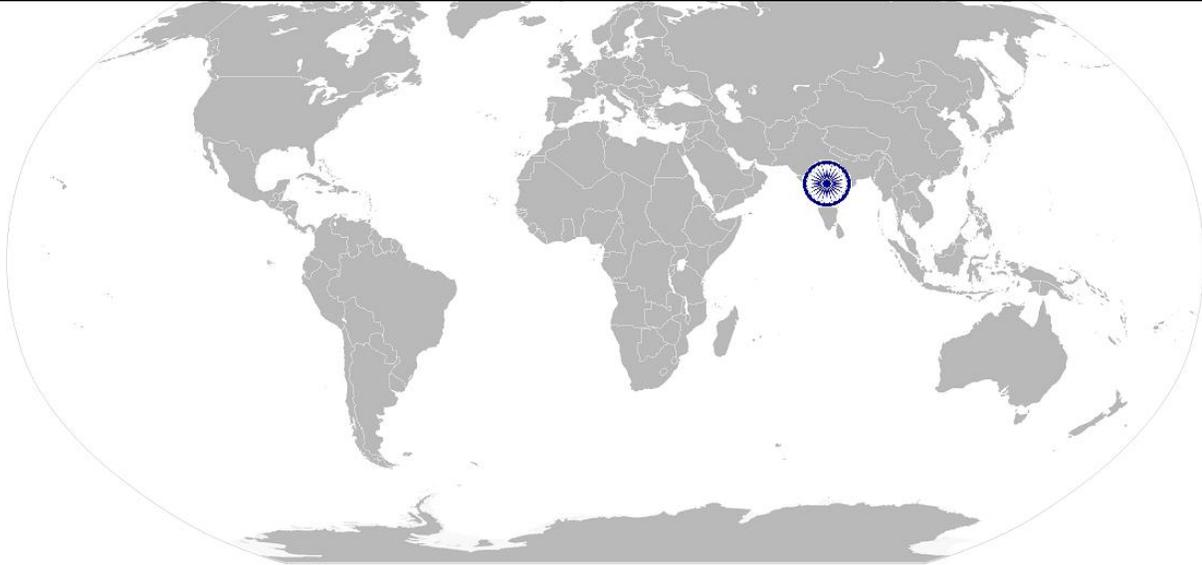
**Maintain customer accounts**

<b>B. Professional Skills</b>	<b>Decision Making</b>
	You need to know and understand how to: SB1. identify anomalies in data SB2. make a decision on a suitable course of action
	<b>Plan and Organize</b>
	You need to know and understand how to: SB3. plan and organize your work to achieve targets and deadlines
	<b>Customer Centricity</b>
	You need to know and understand how to: SB4. work effectively in a customer facing environment SB5. deliver consistent and reliable service to customers SB6. check that your own work meets customer requirements
	<b>Problem Solving</b>
	You need to know and understand how to: SB7. refer anomalies to the supervisor SB8. seek clarification on problems from others
	<b>Analytical Thinking</b>
	You need to know and understand how to: SB9. pass on relevant information to others
	<b>Critical Thinking</b>
	You need to know and understand how to: SB10. apply balanced judgments to different situations
	<b>Attention to Detail</b>
You need to know and understand how to: SB11. check your work is complete and free from errors	
<b>Team Working</b>	
You need to know and understand how to: SB12. work effectively in a team environment SB13. work independently and collaboratively	
<b>C. Technical Skills</b>	You need to know and understand how to: SC1. use information technology effectively to input and/or extract data accurately SC2. store and retrieve information SC3. keep up to date with changes, procedures and practices in your role SC4. identify and refer anomalies in data

**Maintain customer accounts**

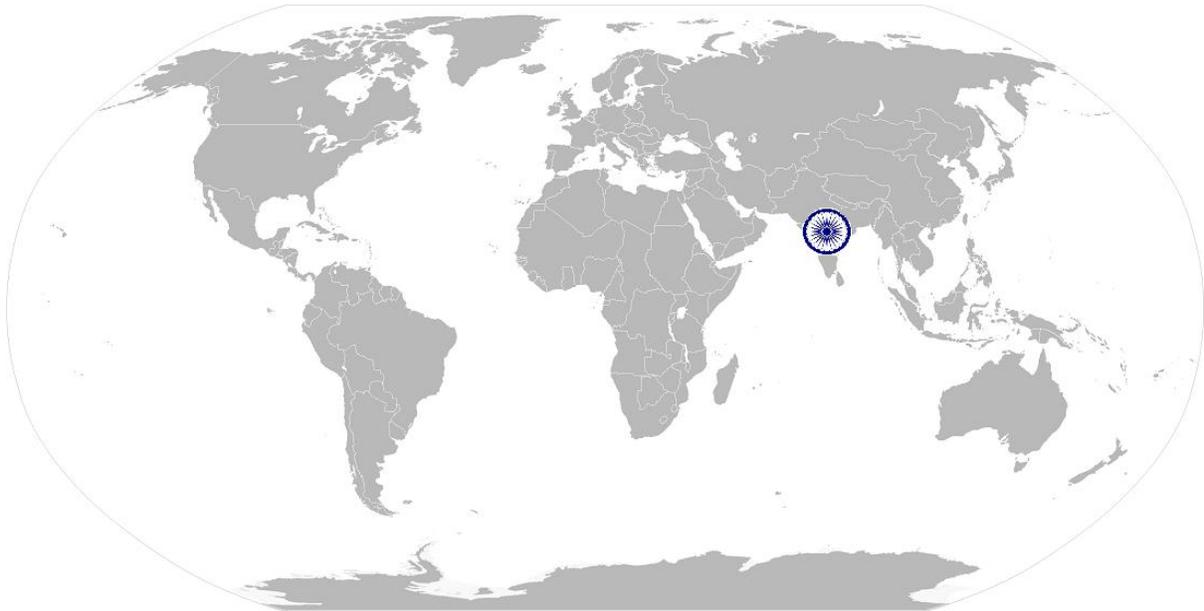
**NOS Version Control**

<b>NOS Code</b>	<b>SSC/N2305</b>		
<b>Credits (NSQF) [OPTIONAL]</b>	<b>TBD</b>	<b>Version number</b>	<b>1.0</b>
<b>Industry</b>	<b>IT-ITeS</b>	<b>Drafted on</b>	<b>30/04/2013</b>
<b>Industry Sub-sector</b>	<b>Business Process Management</b>	<b>Last reviewed on</b>	<b>31/03/2018</b>
		<b>Next review date</b>	<b>31/03/2019</b>



Generate invoices and credit notes

# National Occupational Standard



## Overview

This unit is about generating invoices and credit notes to send to customers, as part of an outsourced finance and accounting process.

Generate invoices and credit notes

Applicable NOS Unit	Unit Code	SSC/N2306
	Unit Title (Task)	Generate invoices and credit notes
	Description	This unit is about generating invoices and credit notes to send to customers, as part of an outsourced finance and accounting process.
	Scope	<p>This unit/task covers the following:</p> <p><b>Appropriate people:</b></p> <ul style="list-style-type: none"> <li>• line manager</li> <li>• members of sales team</li> <li>• subject matter experts</li> </ul>
<b>Performance Criteria (PC) w.r.t. the Scope</b>		
	<p>To be competent, you must be able to:</p> <p>PC1. obtain requests to generate invoices, credit notes and full supporting documentation from sales teams</p> <p>PC2. check systems to verify whether invoices/credit notes have already been generated</p> <p>PC3. validate requests to generate invoices/credit notes against relevant purchase orders, contracts and terms of business</p> <p>PC4. clarify any issues with requests to generate invoices/credit notes with <b>appropriate people</b></p> <p>PC5. enter data for generating invoices/credit notes into your organization's systems, following your organization's policies, procedures, guidelines and client-specific SLAs</p> <p>PC6. check generation of invoices/credit notes with peers and/or supervisor, as required</p> <p>PC7. submit entered invoices/credit notes for review and approval by <b>appropriate people</b></p> <p>PC8. update invoices/credit notes in your organization's systems in case of changes</p> <p>PC9. send invoices/credit notes to <b>appropriate people</b> for signature, where required</p> <p>PC10. send invoices/credit notes to customers and confirm receipt, where required</p> <p>PC11. reconcile invoices/credit notes against system entries on a periodic basis, as required</p> <p>PC12. obtain advice and guidance from <b>appropriate people</b>, where required</p> <p>PC13. comply with your organization's policies, procedures, guidelines and client-specific SLAs when generating invoices and credit notes</p>	
<b>Knowledge and Understanding (K)</b>		
<b>A. Organizational Context</b>	You need to know and understand:	

**Generate invoices and credit notes**

<p>(Knowledge of the company/ organization and its processes)</p>	<p>KA1. your organization’s policies, procedures, guidelines and client-specific SLAs for generating invoices and credit notes, and your role in applying these</p> <p>KA2. your organization’s systems and tools for recording purchase orders, contracts, work orders and terms of business and how to access these</p> <p>KA3. your organization’s systems and tools for generating and approving invoices/credit notes and how to use these</p> <p>KA4. sources of invoice/credit note requests and how to obtain these</p> <p>KA5. data/information required to generate invoices/credit notes</p> <p>KA6. data and documentation required for generating invoices/credit notes</p> <p>KA7. who to involve when checking, approving and obtaining signature for invoices/credit notes</p> <p>KA8. the required timescales for invoices/credit notes and the importance of complying with these</p> <p>KA9. the importance of verifying whether invoices/credit notes have already been issued</p> <p>KA10. the importance of sending and confirming receipt of invoices/credit notes with customers</p> <p>KA11. the importance of reconciling invoices/credit notes against system entries periodically and how to do this</p> <p>KA12. your organization’s guidelines and procedures for communicating with customers</p> <p>KA13. who to obtain advice and guidance from when required</p> <p>KA14. methods and techniques when working with others</p> <p>KA15. standard tools and templates available and how to access and use these</p> <p>KA16. your organization’s policies and procedures for recording and storing records, maintaining information security and protecting data and the importance of complying with these</p>
<p><b>B. Technical Knowledge</b></p>	<p>You need to know and understand:</p> <p>KB1. how to validate requests for invoice/credit notes against purchase orders, contracts and terms of business</p> <p>KB2. common issues with requests for invoices/credit notes and who to seek guidance from to clarify and resolve these</p>
<p><b>Skills (S)</b></p>	
<p><b>A. Core Skills/ Generic Skills</b></p>	<p><b>Writing Skills</b></p> <p>You need to know and understand how to:</p> <p>SA1. complete accurate well written work with attention to detail</p> <p>SA2. communicate with others in writing</p> <p><b>Reading Skills</b></p> <p>You need to know and understand how to:</p> <p>SA3. follow guidelines/procedures/rules and service level agreements</p>

**Generate invoices and credit notes**

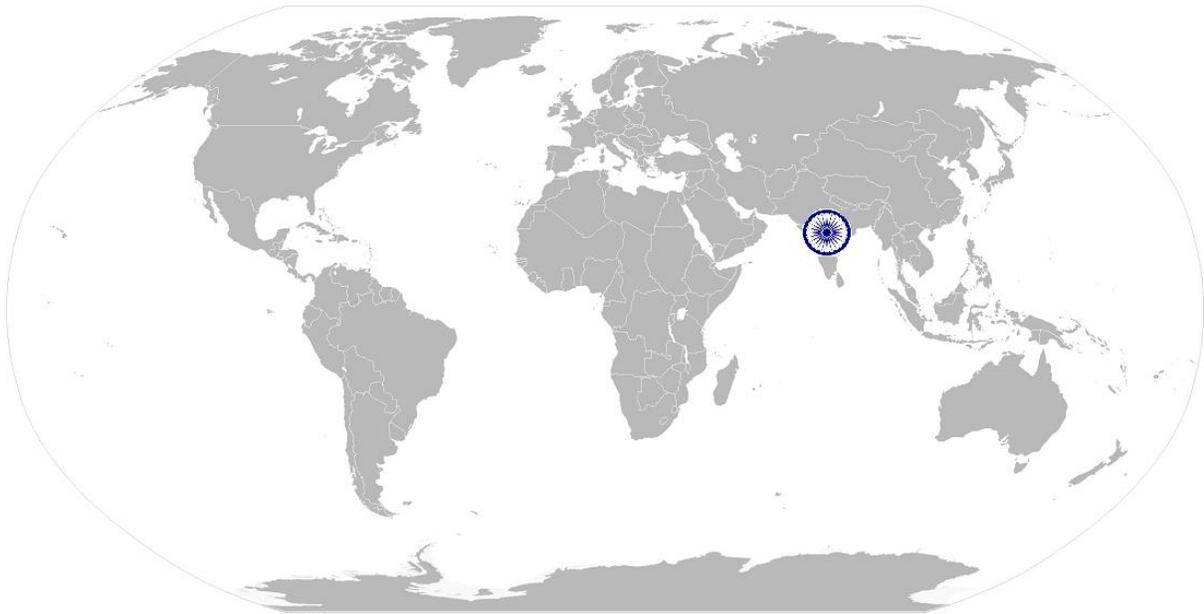
	<p><b>Oral Communication (Listening and Speaking skills)</b></p> <p>You need to know and understand how to:</p> <p>SA4. listen effectively and orally communicate information accurately</p> <p>SA5. ask for clarification and advice from others</p>
<b>B. Professional Skills</b>	<p><b>Decision Making</b></p> <p>You need to know and understand how to:</p> <p>SB1. follow rule-based decision-making processes</p> <p>SB2. make a decision on a suitable course of action</p>
	<p><b>Plan and Organize</b></p> <p>You need to know and understand how to:</p> <p>SB3. plan and organize your work to achieve targets and deadlines</p>
	<p><b>Customer Centricity</b></p> <p>You need to know and understand how to:</p> <p>SB4. carry out rule-based transactions in line with customer-specific guidelines, procedures, rules and service level agreements</p> <p>SB5. work effectively in a customer facing environment</p> <p>SB6. deliver consistent and reliable service to customers</p>
	<p><b>Problem Solving</b></p> <p>You need to know and understand how to:</p> <p>SB7. refer anomalies to the supervisor</p> <p>SB8. seek clarification on problems from others</p>
	<p><b>Analytical Thinking</b></p> <p>You need to know and understand how to:</p> <p>SB9. analyze data and activities</p> <p>SB10. pass on relevant information to others</p>
	<p><b>Critical Thinking</b></p> <p>You need to know and understand how to:</p> <p>SB11. apply balanced judgments to different situations</p>
	<p><b>Attention to Detail</b></p> <p>You need to know and understand how to:</p> <p>SB12. check your work is complete and free from errors</p> <p>SB13. get your work checked by others</p>
	<p><b>Team Working</b></p> <p>You need to know and understand how to:</p> <p>SB14. contribute to the quality of team working</p> <p>SB15. work effectively in a team environment</p>
	<p><b>C. Technical Skills</b></p> <p>You need to know and understand how to:</p> <p>SC1. use information technology effectively to input and/or extract data accurately</p> <p>SC2. identify and refer anomalies in data</p>



SSC/N2306

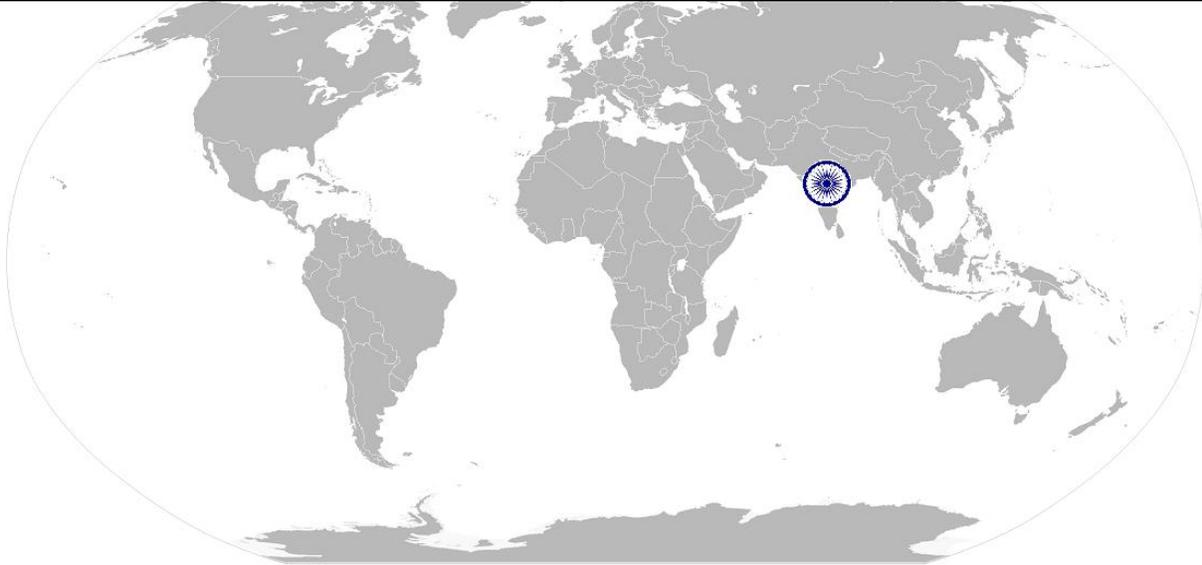
**Generate invoices and credit notes**

	<p>SC3. store and retrieve information</p> <p>SC4. keep up to date with changes, procedures and practices in your role</p> <p>SC5. use software packages and tools specific to your field of expertise</p>
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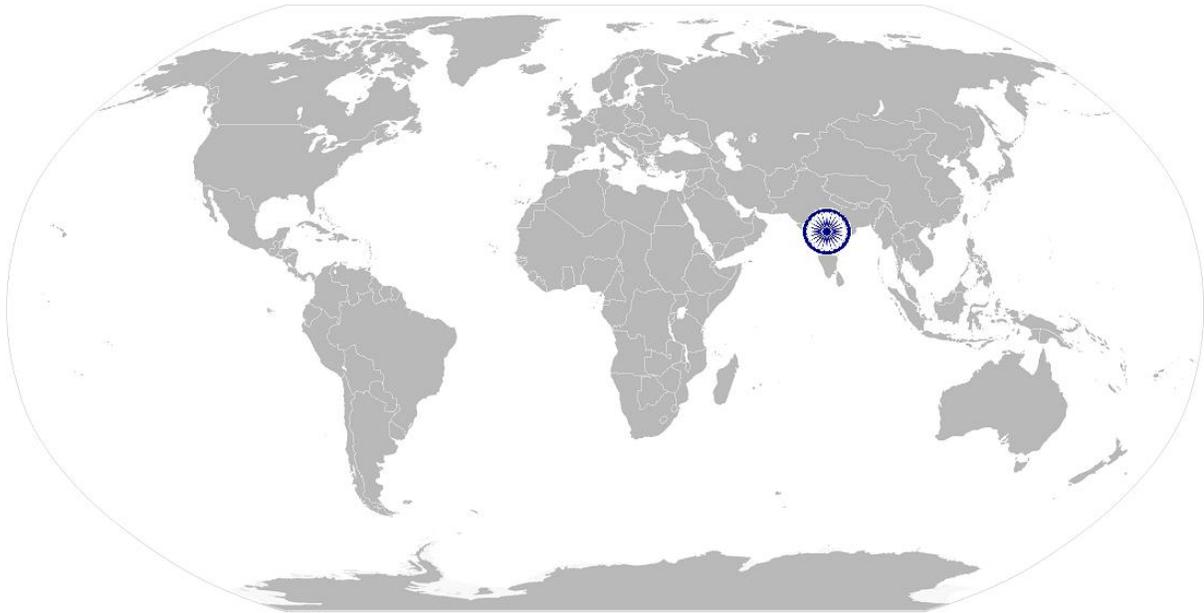
**Generate invoices and credit notes**

<b>NOS Code</b>	<b>SSC/N2306</b>		
<b>Credits (NSQF) [OPTIONAL]</b>	<b>TBD</b>	<b>Version number</b>	<b>1.0</b>
<b>Industry</b>	<b>IT-ITeS</b>	<b>Drafted on</b>	<b>30/04/2013</b>
<b>Industry Sub-sector</b>	<b>Business Process Management</b>	<b>Last reviewed on</b>	<b>31/03/2018</b>
		<b>Next review date</b>	<b>31/03/2019</b>



Receive payments and apply cash

# National Occupational Standard



## Overview

This unit is about making receiving payments from customers and applying payments to relevant invoices, as part of an outsourced finance and accounting process.

SSC/N2307

Receive payments and apply cash

Applicable NOS Unit

Unit Code	SSC/N2307
Unit Title (Task)	Receive payments and apply cash
Description	This unit is about making receiving payments from customers and applying payments to relevant invoices, as part of an outsourced finance and accounting process.
Scope	<p>This unit/task covers the following:</p> <p><b>Cash Application types:</b></p> <ul style="list-style-type: none"> <li>• split</li> <li>• partial</li> <li>• full</li> <li>• adjustments</li> <li>• chargebacks</li> </ul> <p><b>Appropriate people:</b></p> <ul style="list-style-type: none"> <li>• line manager</li> <li>• members of sales teams</li> <li>• customers</li> <li>• subject matter experts</li> </ul>
<b>Performance Criteria (PC) w.r.t. the Scope</b>	
	<p>To be competent, you must be able to:</p> <p>PC1. verify the sources and amounts of payments received</p> <p>PC2. record payments received in your organization's systems, following your organization's policies, procedures, guidelines and client-specific SLAs</p> <p>PC3. identify the invoices/credit notes to which receipts relate in order to allocate payments correctly</p> <p>PC4. direct receipts into relevant bank accounts, following your organization's policies, procedures, guidelines and client-specific SLAs</p> <p>PC5. identify any issues with payments from customers and clarify these with <b>appropriate people</b></p> <p>PC6. respond promptly to payment queries from customers referred by the accounts receivable helpdesk</p> <p>PC7. reconcile receipts against bank statements on a periodic basis, as required</p> <p>PC8. liaise effectively with banks regarding any queries about reconciliation of receipts</p> <p>PC9. obtain advice and guidance from <b>appropriate people</b>, where required</p> <p>PC10. comply with your organization's policies, procedures, guidelines and client-specific SLAs when receiving payments and applying cash</p>
<b>Knowledge and Understanding (K)</b>	
<b>A. Organizational Context</b>	You need to know and understand:

SSC/N2307

Receive payments and apply cash

<p>(Knowledge of the company/ organization and its processes)</p>	<p>KA1. your organization's policies, procedures, guidelines and client-specific SLAs for receiving payments and applying cash and your role in applying these</p> <p>KA2. your organization's systems and tools for recording payments and applying cash and how to use these</p> <p>KA3. different cash application types used by your organization, including for credit and debit card payments, and how to handle these</p> <p>KA4. data/information required for making payments</p> <p>KA5. your organization's processes for directing receipts into relevant bank accounts</p> <p>KA6. your organization's processes and guidelines for communicating with banks</p> <p>KA7. the required timescales for receiving and making payments and the importance of complying with these</p> <p>KA8. who to obtain advice and guidance from</p> <p>KA9. methods and techniques when working with others</p> <p>KA10. standard tools and templates available and how to access and use these</p> <p>KA11. the importance of reconciling receipts against bank statements and how to do this</p> <p>KA12. your organization's policies and procedures for recording and storing records, maintaining information security and protecting data and the importance of complying with these</p>
<p><b>B. Technical Knowledge</b></p>	<p>You need to know and understand:</p> <p>KB1. the importance of verifying the source and amount for payments received and how to do this</p> <p>KB2. how to check and allocate received payments against invoices/credit notes</p> <p>KB3. how to access and direct received payments into the relevant bank accounts</p> <p>KB4. how to identify and check un-allocated cash and what to do with outstanding un-allocated cash</p> <p>KB5. ways in which customers may behave in cases where collection is delayed and how to address this</p> <p>KB6. common issues with customer payments and who to seek guidance from to clarify and resolve these</p> <p>KB7. types of queries referred from the accounts receivable helpdesk and standard responses to these</p>
<p><b>Skills (S)</b></p>	
<p><b>A. Core Skills/ Generic Skills</b></p>	<p><b>Writing Skills</b></p> <p>You need to know and understand how to:</p> <p>SA1. complete accurate well written work with attention to detail</p> <p>SA2. communicate with others in writing</p> <p><b>Reading Skills</b></p>

SSC/N2307

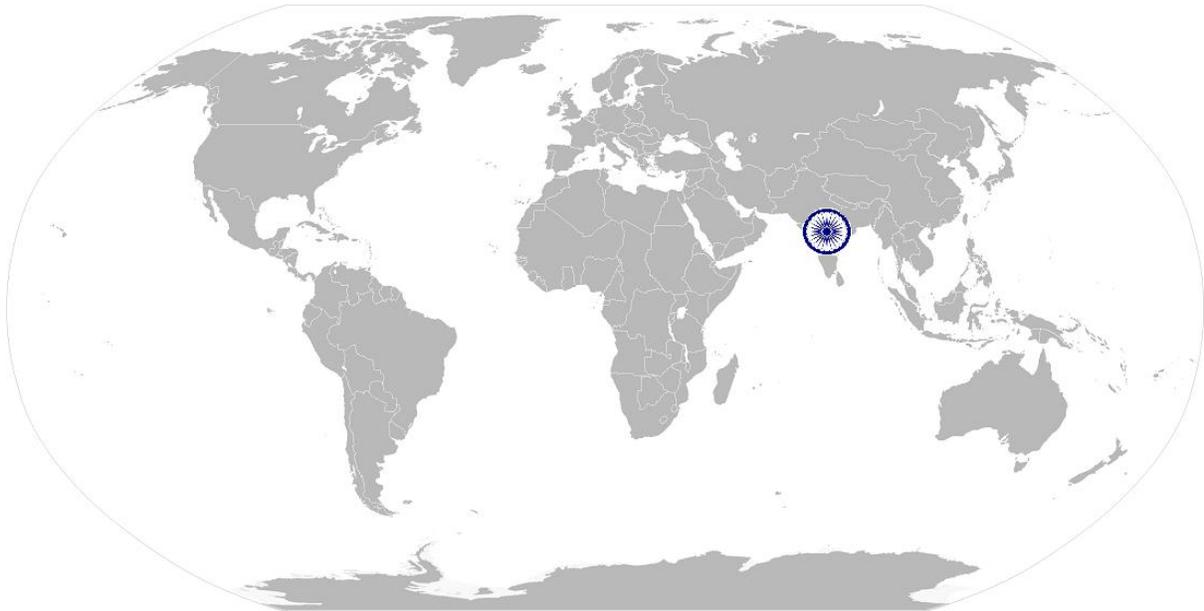
**Receive payments and apply cash**

	<p>You need to know and understand how to:</p> <p>SA3. follow guidelines, procedures, rules and service level agreements</p>
	<p><b>Oral Communication (Listening and Speaking skills)</b></p>
	<p>You need to know and understand how to:</p> <p>SA4. listen effectively and orally communicate information accurately</p> <p>SA5. ask for clarification and advice from others</p>
<b>B. Professional Skills</b>	<p><b>Decision Making</b></p>
	<p>You need to know and understand how to:</p> <p>SB1. follow rule-based decision-making processes</p> <p>SB2. make a decision on a suitable course of action</p>
	<p><b>Plan and Organize</b></p>
	<p>You need to know and understand how to:</p> <p>SB3. plan and organize your work to achieve targets and deadlines</p>
	<p><b>Customer Centricity</b></p>
	<p>You need to know and understand how to:</p> <p>SB4. carry out rule-based transactions in line with customer-specific guidelines, procedures, rules and service level agreements</p> <p>SB5. work effectively in a customer facing environment</p> <p>SB6. deliver consistent and reliable service to customers</p>
	<p><b>Problem Solving</b></p>
	<p>You need to know and understand how to:</p> <p>SB7. refer anomalies to the supervisor</p> <p>SB8. seek clarification on problems from others</p>
	<p><b>Analytical Thinking</b></p>
	<p>You need to know and understand how to:</p> <p>SB9. analyze data and activities</p> <p>SB10. pass on relevant information to others</p>
	<p><b>Critical Thinking</b></p>
	<p>You need to know and understand how to:</p> <p>SB11. apply balanced judgments to different situations</p>
	<p><b>Attention to Detail</b></p>
	<p>You need to know and understand how to:</p> <p>SB12. check your work is complete and free from errors</p> <p>SB13. get your work checked by others</p>
	<p><b>Team Working</b></p>
	<p>You need to know and understand how to:</p> <p>SB14. contribute to the quality of team working</p> <p>SB15. work effectively in a team environment</p>

SSC/N2307

**Receive payments and apply cash**

<b>C. Technical Skills</b>	You need to know and understand how to: SC1. use information technology effectively to input and/or extract data accurately SC2. identify and refer anomalies in data SC3. store and retrieve information SC4. keep up to date with changes, procedures and practices in your role SC5. use software packages and tools specific to your field of expertise
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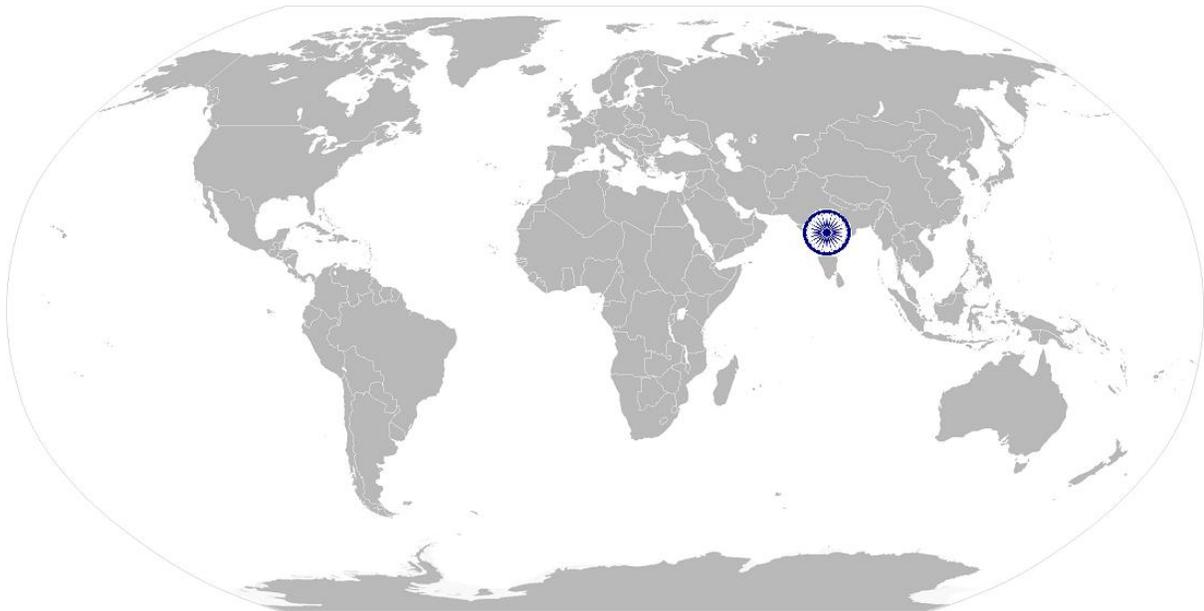
**Receive payments and apply cash**

**NOS Version Control**

<b>NOS Code</b>	<b>SSC/N2307</b>		
<b>Credits (NSQF) [OPTIONAL]</b>	<b>TBD</b>	<b>Version number</b>	<b>1.0</b>
<b>Industry</b>	<b>IT-ITeS</b>	<b>Drafted on</b>	<b>30/04/2013</b>
<b>Industry Sub-sector</b>	<b>Business Process Managements</b>	<b>Last reviewed on</b>	<b>31/03/2018</b>
		<b>Next review date</b>	<b>31/03/2019</b>



# National Occupational Standard



## Overview

This unit is about dealing with queries received from customers relating to invoices they have received.

SSC/N2309

Deal with queries at the accounts receivable helpdesk

Applicable NOS Unit

Unit Code	SSC/N2309
Unit Title (Task)	Deal with queries at the accounts receivable helpdesk
Description	This unit is about dealing with queries received from customers relating to invoices they have received.
Scope	<p>This unit/task covers the following:</p> <p><b>Queries</b> received by:</p> <ul style="list-style-type: none"> <li>• telephone</li> <li>• e-mail</li> <li>• chat</li> </ul> <p><b>Appropriate people:</b></p> <ul style="list-style-type: none"> <li>• supervisor</li> <li>• members of the accounts payable team</li> <li>• subject matter experts</li> </ul>
<b>Performance Criteria (PC) w.r.t. the Scope</b>	
	<p>To be competent, you must be able to:</p> <p>PC1. greet customers and verify their details, following your organization's procedures</p> <p>PC2. listen carefully to customers and ask appropriate questions to understand the nature of their <b>queries</b></p> <p>PC3. summarize and obtain confirmation from customers of your understanding of their <b>queries</b></p> <p>PC4. express your concern for any difficulties caused and your commitment to resolving their <b>queries</b></p> <p>PC5. record and categorize queries accurately using your organization's query management tool</p> <p>PC6. obtain relevant information from the accounts receivable system and communicate this information clearly to customers</p> <p>PC7. confirm with customers their commitment to make timely payments, where required</p> <p>PC8. refer <b>queries</b> that cannot be dealt with by reference to the accounts receivable system promptly to <b>appropriate people</b></p> <p>PC9. provide customers with a justifiable estimate of time to respond to their <b>queries</b>, where an immediate response cannot be given</p> <p>PC10. monitor resolution of queries to keep customers informed about progress and any delays in resolving their <b>queries</b></p> <p>PC11. obtain confirmation from customers that their <b>queries</b> have been resolved to their satisfaction</p> <p>PC12. record the resolution of <b>queries</b> accurately using your organization's query management tool</p>

SSC/N2309

**Deal with queries at the accounts receivable helpdesk**

	<p>PC13. comply with relevant standards, policies, procedures, guidelines and service level agreements (SLAs) when dealing with <b>queries</b> at the accounts receivable helpdesk</p>
<p><b>Knowledge and Understanding (K)</b></p>	
<p><b>A. Organizational Context</b> (Knowledge of the company/ organization and its processes)</p>	<p>You need to know and understand:</p> <ul style="list-style-type: none"> <li>KA1. your organization’s standards, policies, procedures, guidelines and service level agreements (SLAs) for dealing with accounts receivable queries and your role in applying these</li> <li>KA2. your organization’s guidelines and protocols for communicating with customers</li> <li>KA3. your organization’s query management tool for recording and monitoring queries and how to use this</li> <li>KA4. your organization’s systems and tools for recording historical queries and how to access this to identify solutions</li> <li>KA5. your organization’s accounts receivable system and how to use this</li> <li>KA6. limits of your role and responsibilities in relation to accounts receivable queries</li> <li>KA7. types of financial information required from customers to make payment and how to obtain this</li> <li>KA8. typical timescales for dealing with queries and the importance of complying with these</li> <li>KA9. your organization’s terms of payment and when these can be negotiated</li> <li>KA10. who to refer queries to when they cannot be resolved by the accounts receivable helpdesk</li> <li>KA11. the importance of keeping customers informed about timescales for progress and resolution of their query</li> <li>KA12. typical response times for helpdesk queries and the circumstances in which these may be exceeded</li> <li>KA13. your organization’s processes and procedures for reporting and handling exceptions and your role in applying these</li> <li>KA14. the importance of confirming resolution of queries to customers satisfaction</li> <li>KA15. who to seek advice and guidance from</li> <li>KA16. methods and techniques used when working with customers</li> <li>KA17. standard tools, templates and scripts available for dealing with queries and how to access and use these</li> <li>KA18. your organization’s policies and procedures for recording and storing records, maintaining information security and protecting data, and the importance of complying with these</li> </ul>
<p><b>B. Technical Knowledge</b></p>	<p>You need to know and understand:</p> <ul style="list-style-type: none"> <li>KB1. different styles and approaches when working with customers</li> </ul>

**Deal with queries at the accounts receivable helpdesk**

	<p>KB2. techniques for conveying concern and commitment</p> <p>KB3. different questioning techniques for understanding queries</p> <p>KB4. the importance of summarizing and confirming understanding of queries</p> <p>KB5. common types of queries and how to resolve them</p> <p>KB6. the importance of timely payment from customers and techniques to achieve and confirm this</p> <p>KB7. issues that may affect customers satisfaction and how to deal with these</p> <p>KB8. current practice in customer service</p>
<b>Skills (S)</b>	
<p><b>A. Core Skills/ Generic Skills</b></p>	<p><b>Writing Skills</b></p>
	<p>You need to know and understand how to:</p> <p>SA1. complete accurate well written work with attention to detail</p> <p>SA2. communicate with others in writing</p>
	<p><b>Reading Skills</b></p>
	<p>You need to know and understand how to:</p> <p>SA3. follow instructions, guidelines, procedures, rules and service level agreements</p>
	<p><b>Oral Communication (Listening and Speaking skills)</b></p>
	<p>You need to know and understand how to:</p> <p>SA4. listen effectively and orally communicate information accurately</p> <p>SA5. ask for clarification and advice from others</p> <p>SA6. communicate orally with colleagues regarding queries</p>
<p><b>B. Professional Skills</b></p>	<p><b>Decision Making</b></p>
	<p>You need to know and understand how to:</p> <p>SB1. identify anomalies in data</p> <p>SB2. follow rule-based decision-making processes</p> <p>SB3. make a decision on a suitable course of action</p>
	<p><b>Plan and Organize</b></p>
	<p>You need to know and understand how to:</p> <p>SB4. plan and organize your work to achieve targets and deadlines</p>
	<p><b>Customer Centricity</b></p>
	<p>You need to know and understand how to:</p> <p>SB5. carry out rule-based transactions in line with customer-specific guidelines, procedures, rules and service level agreements</p> <p>SB6. check that your own and/or your peers work meets customer requirements</p> <p>SB7. deliver consistent and reliable service to customers</p> <p>SB8. work effectively in a customer facing environment</p> <p>SB9. build and maintain positive and effective relationships with customers</p>
<p><b>Problem Solving</b></p>	
<p>You need to know and understand how to:</p>	

**Deal with queries at the accounts receivable helpdesk**

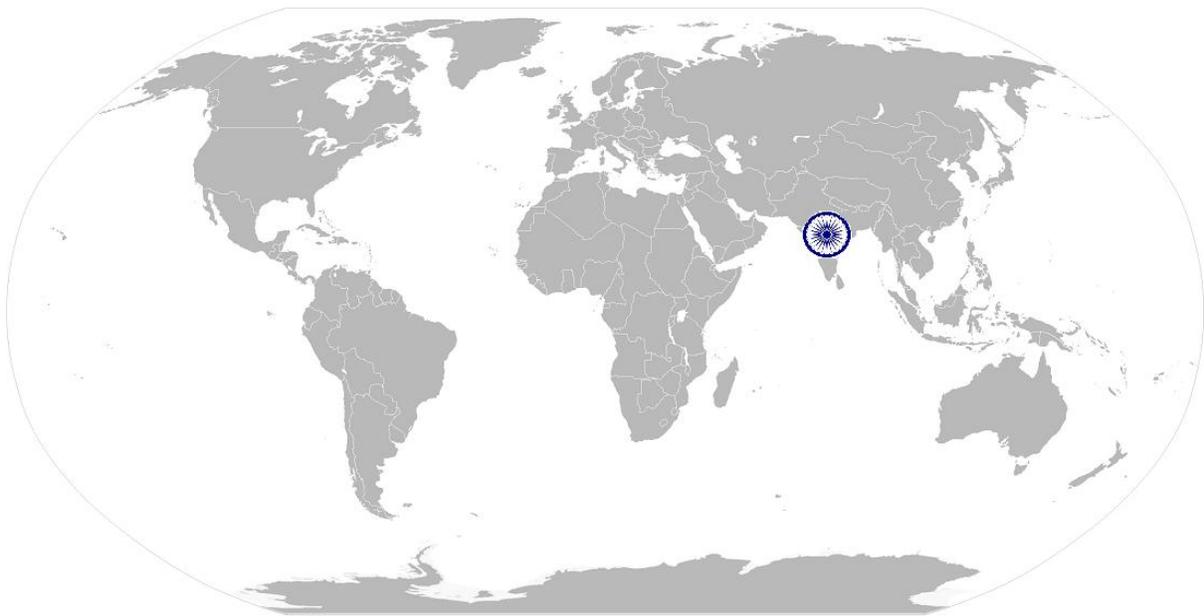
	SB10. seek clarification on problems from others SB11. apply problem-solving approaches in different situations
	<b>Analytical Thinking</b>
	You need to know and understand how to: SB12. analyze data and activities SB13. pass on relevant information to others
	<b>Critical Thinking</b>
	You need to know and understand how to: SB14. apply balanced judgments to different situations
	<b>Attention to Detail</b>
	You need to know and understand how to: SB15. check your work is complete and free from errors
	<b>Team Working</b>
	You need to know and understand how to: SB16. work effectively in a team environment SB17. contribute to the quality of team working SB18. work independently and collaboratively
<b>C. Technical Skills</b>	You need to know and understand how to: SC1. use information technology effectively to input and/or extract data accurately SC2. store and retrieve information SC3. agree objectives and work requirements SC4. keep up to date with changes, procedures and practices in your role

**Deal with queries at the accounts receivable helpdesk**

<b>NOS Code</b>	<b>SSC/N2309</b>		
<b>Credits (NSQF) [OPTIONAL]</b>	<b>TBD</b>	<b>Version number</b>	<b>1.0</b>
<b>Industry</b>	<b>IT-ITeS</b>	<b>Drafted on</b>	<b>30/04/2013</b>
<b>Industry Sub-sector</b>	<b>Business Process Management</b>	<b>Last reviewed on</b>	<b>31/03/2018</b>
		<b>Next review date</b>	<b>31/03/2019</b>



# National Occupational Standard



## Overview

This unit is about planning and organizing your work in order to complete it to the required standards on time

SSC/N9001

Manage your work to meet requirements

Applicable NOS Unit

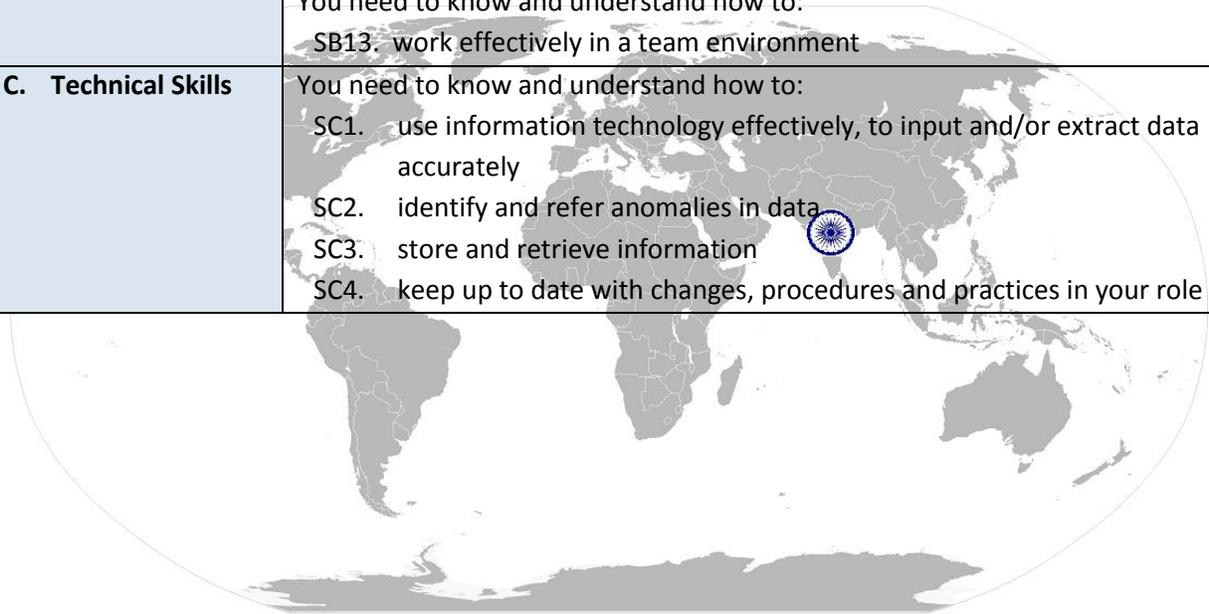
<b>Unit Code</b>	SSC/N9001
<b>Unit Title (Task)</b>	Manage your work to meet requirements
<b>Description</b>	This unit is about planning and organizing your work in order to complete it to the required standards on time.
<b>Scope</b>	<p>This unit/task covers the following:</p> <p><b>Work requirements:</b></p> <ul style="list-style-type: none"> <li>• activities (what you are required to do)</li> <li>• deliverables (the outputs of your work)</li> <li>• quantity (the volume of work you are expected to complete)</li> <li>• standards (what is acceptable performance, including compliance with Service Level Agreements)</li> <li>• timing (when your work needs to be completed)</li> </ul> <p><b>Appropriate people:</b></p> <ul style="list-style-type: none"> <li>• line manager</li> <li>• the person requesting the work</li> <li>• members of the team/department</li> <li>• members from other teams/departments</li> </ul> <p><b>Resources:</b></p> <ul style="list-style-type: none"> <li>• equipment</li> <li>• materials</li> <li>• information</li> </ul>
<b>Performance Criteria (PC) w.r.t. the Scope</b>	
	<p>To be competent on the job, you must be able to:</p> <p>PC1. establish and agree your <b>work requirements</b> with <b>appropriate people</b></p> <p>PC2. keep your immediate work area clean and tidy</p> <p>PC3. utilize your time effectively</p> <p>PC4. use <b>resources</b> correctly and efficiently</p> <p>PC5. treat confidential information correctly</p> <p>PC6. work in line with your organization's policies and procedures</p> <p>PC7. work within the limits of your job role</p> <p>PC8. obtain guidance from <b>appropriate people</b>, where necessary</p> <p>PC9. ensure your work meets the agreed <b>requirements</b></p>
<b>Knowledge and Understanding (K)</b>	
<b>A. Organizational Context</b> (Knowledge of the company/ organization and its processes)	<p>You need to know and understand:</p> <p>KA1. your organization's policies, procedures and priorities for your area of work and your role and responsibilities in carrying out your work</p> <p>KA2. limits of your responsibilities and when to involve others</p> <p>KA3. your specific work requirements and who these must be agreed with</p> <p>KA4. the importance of having a tidy work area and how to do this</p> <p>KA5. how to prioritize your workload according to urgency and importance and the benefits of this</p>

**Manage your work to meet requirements**

	<p>KA6. your organization's policies and procedures for dealing with confidential information and the importance of complying with these</p> <p>KA7. the purpose of keeping others updated with the progress of your work</p> <p>KA8. who to obtain guidance from and the typical circumstances when this may be required</p> <p>KA9. the purpose and value of being flexible and adapting work plans to reflect change</p>
<b>B. Technical Knowledge</b>	<p>You need to know and understand:</p> <p>KB1. the importance of completing work accurately and how to do this</p> <p>KB2. appropriate timescales for completing your work and the implications of not meeting these for you and the organization</p> <p>KB3. resources needed for your work and how to obtain and use these</p>
<b>Skills (S)</b>	
<b>A. Core Skills/ Generic Skills</b>	<b>Writing Skills</b>
	You need to know and understand how to:
	SA1. complete accurate work with attention to detail
	<b>Reading Skills</b>
	You need to know and understand how to:
SA2. read instructions, guidelines, procedures, rules and service level agreements	
<b>Oral Communication (Listening and Speaking skills)</b>	
You need to know and understand how to:	
SA3. ask for clarification and advice from line managers	
SA4. communicate orally with colleagues	
<b>B. Professional Skills</b>	<b>Decision Making</b>
	You need to know and understand how to:
	SB1. make a decision on a suitable course of action
	<b>Plan and Organize</b>
	You need to know and understand how to:
	SB2. plan and organize your work to achieve targets and deadlines
	SB3. agree objectives and work requirements
	<b>Customer Centricity</b>
	You need to know and understand how to:
	SB4. deliver consistent and reliable service to customers
SB5. check that your own work meets customer requirements	
<b>Problem Solving</b>	
You need to know and understand how to:	
SB6. refer anomalies to the line manager	
SB7. seek clarification on problems from others	
<b>Analytical Thinking</b>	

**Manage your work to meet requirements**

	You need to know and understand how to: SB8. provide relevant information to others SB9. analyze needs, requirements and dependencies in order to meet your work requirements
	<b>Critical Thinking</b>
	You need to know and understand how to: SB10. apply judgments to different situations
	<b>Attention to Detail</b>
	You need to know and understand how to: SB11. check your work is complete and free from errors SB12. get your work checked by peers
	<b>Team Working</b>
	You need to know and understand how to: SB13. work effectively in a team environment
<b>C. Technical Skills</b>	You need to know and understand how to: SC1. use information technology effectively, to input and/or extract data accurately SC2. identify and refer anomalies in data SC3. store and retrieve information SC4. keep up to date with changes, procedures and practices in your role

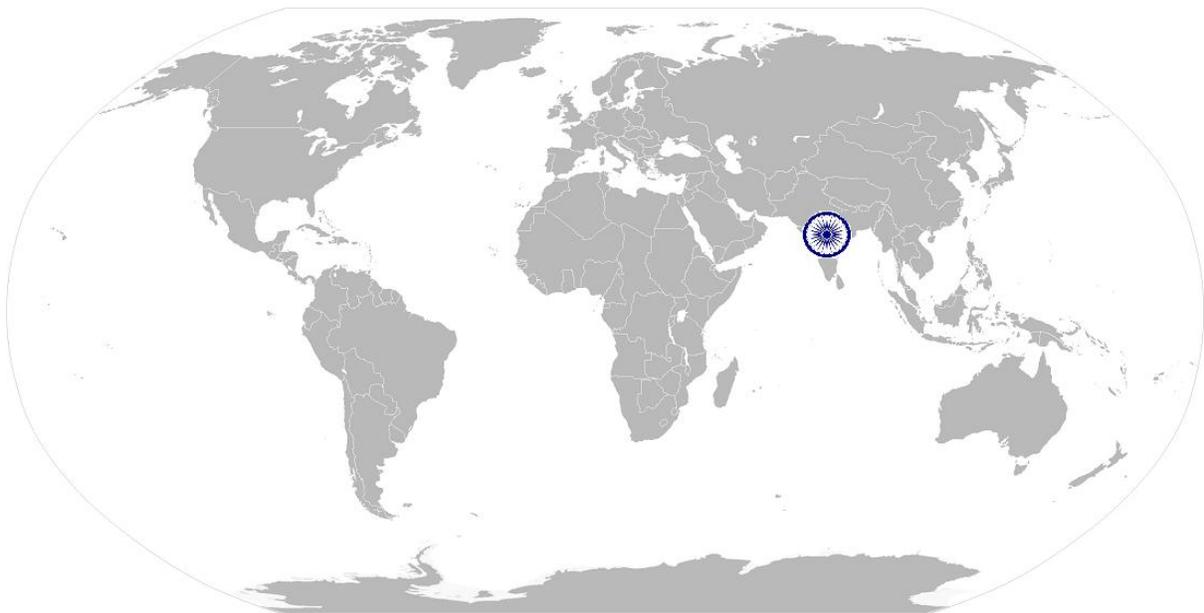


**Manage your work to meet requirements**

<b>NOS Code</b>	<b>SSC/N9001</b>		
<b>Credits (NSQF) [OPTIONAL]</b>	<b>TBD</b>	<b>Version number</b>	<b>1.0</b>
<b>Industry</b>	<b>IT-ITeS</b>	<b>Drafted on</b>	<b>30/04/2013</b>
<b>Industry Sub-sector</b>	<b>Business Process Managements</b>	<b>Last reviewed on</b>	<b>31/03/2018</b>
		<b>Next review date</b>	<b>31/03/2019</b>



# National Occupational Standard



## Overview

This unit is about working effectively with colleagues, either in your own work group or in other work groups within your organization.

Work effectively with colleagues

Applicable NOS Unit

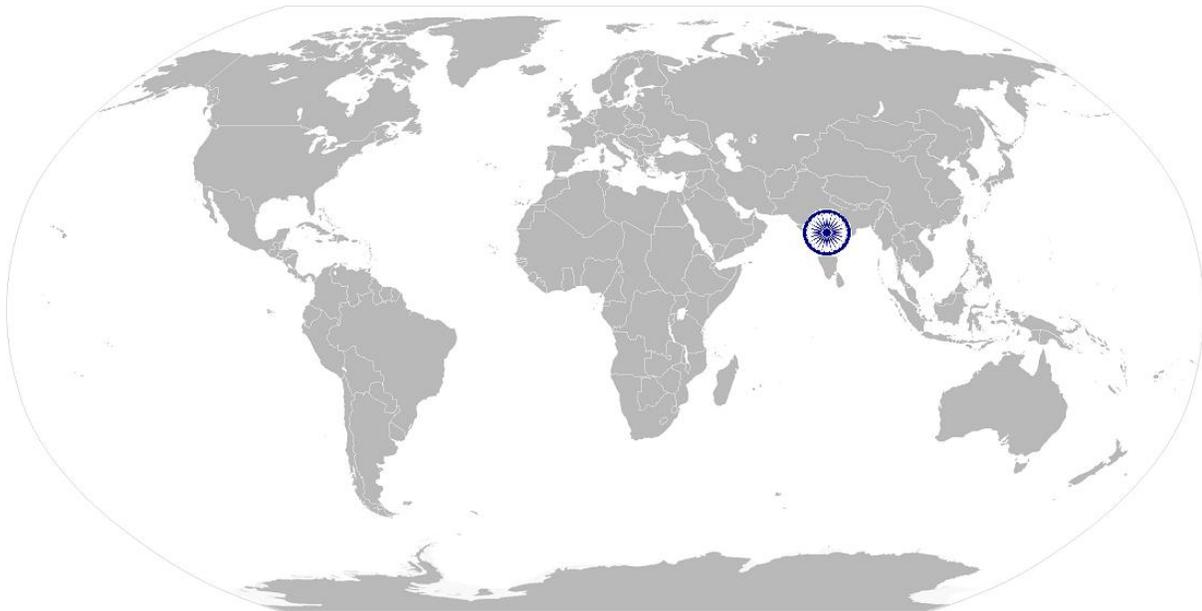
<b>Unit Code</b>	SSC/N9002
<b>Unit Title (Task)</b>	Work effectively with colleagues
<b>Description</b>	This unit is about working effectively with colleagues, either in your own work group or in other work groups within your organization.
<b>Scope</b>	<p>This unit/task covers the following:</p> <p><b>Colleagues:</b></p> <ul style="list-style-type: none"> <li>line manager</li> <li>members of your own work group</li> <li>people in other work groups in your organization</li> </ul> <p><b>Communicate:</b></p> <ul style="list-style-type: none"> <li>face-to-face</li> <li>by telephone</li> <li>in writing</li> </ul>
<b>Performance Criteria (PC) w.r.t. the Scope</b>	
	<p>To be competent, you must be able to:</p> <p>PC1. communicate with <b>colleagues</b> clearly, concisely and accurately</p> <p>PC2. work with <b>colleagues</b> to integrate your work effectively with them</p> <p>PC3. pass on essential information to <b>colleagues</b> in line with organizational requirements</p> <p>PC4. work in ways that show respect for <b>colleagues</b></p> <p>PC5. carry out commitments you have made to <b>colleagues</b></p> <p>PC6. let <b>colleagues</b> know in good time if you cannot carry out your commitments, explaining the reasons</p> <p>PC7. identify any problems you have working with <b>colleagues</b> and take the initiative to solve these problems</p> <p>PC8. follow the organization's policies and procedures for working with <b>colleagues</b></p>
<b>Knowledge and Understanding (K)</b>	
<b>A. Organizational Context</b> (Knowledge of the company/ organization and its processes)	<p>You need to know and understand:</p> <p>KA1. your organization's policies and procedures for working with colleagues and your role and responsibilities in relation to this</p> <p>KA2. the importance of effective communication and establishing good working relationships with colleagues</p> <p>KA3. different methods of communication and the circumstances in which it is appropriate to use these</p> <p>KA4. benefits of developing productive working relationships with colleagues</p> <p>KA5. the importance of creating an environment of trust and mutual respect in an environment where you have no authority over those you are working with</p> <p>KA6. where you do not meet your commitments, the implications this will have on individuals and the organization</p>
<b>B. Technical Knowledge</b>	You need to know and understand:

**Work effectively with colleagues**

	<p>KB1. different types of information that colleagues might need and the importance of providing this information when it is required</p> <p>KB2. the importance of understanding problems from your colleague's perspective and how to provide support, where necessary, to resolve these</p>
<b>Skills (S)</b>	
<b>A. Core Skills/ Generic Skills</b>	<b>Writing Skills</b>
	You need to know and understand how to: SA1. complete accurate, well written work with attention to detail SA2. communicate effectively with colleagues in writing
	<b>Reading Skills</b>
	You need to know and understand how to: SA3. read instructions, guidelines, procedures, rules and service level agreements
	<b>Oral Communication (Listening and Speaking skills)</b>
	You need to know and understand how to: SA4. listen effectively and orally communicate information accurately SA5. ask for clarification and advice from line managers
<b>B. Professional Skills</b>	<b>Decision Making</b>
	You need to know and understand how to: SB1. make a decision on a suitable course of action
	<b>Plan and Organize</b>
	You need to know and understand how to: SB2. plan and organize your work to achieve targets and deadlines
	<b>Customer Centricity</b>
	You need to know and understand how to: SB3. check that your own work meets customer requirements SB4. deliver consistent and reliable service to customers
	<b>Problem Solving</b>
	You need to know and understand how to: SB5. apply problem solving approaches in different situations
	<b>Critical Thinking</b>
	You need to know and understand how to: SB6. apply balanced judgments to different situations
	<b>Attention to Detail</b>
You need to know and understand how to: SB7. check your work is complete and free from errors SB8. get your work checked by peers	
<b>Team Working</b>	
You need to know and understand how to: SB9. work effectively in a team environment	

**Work effectively with colleagues**

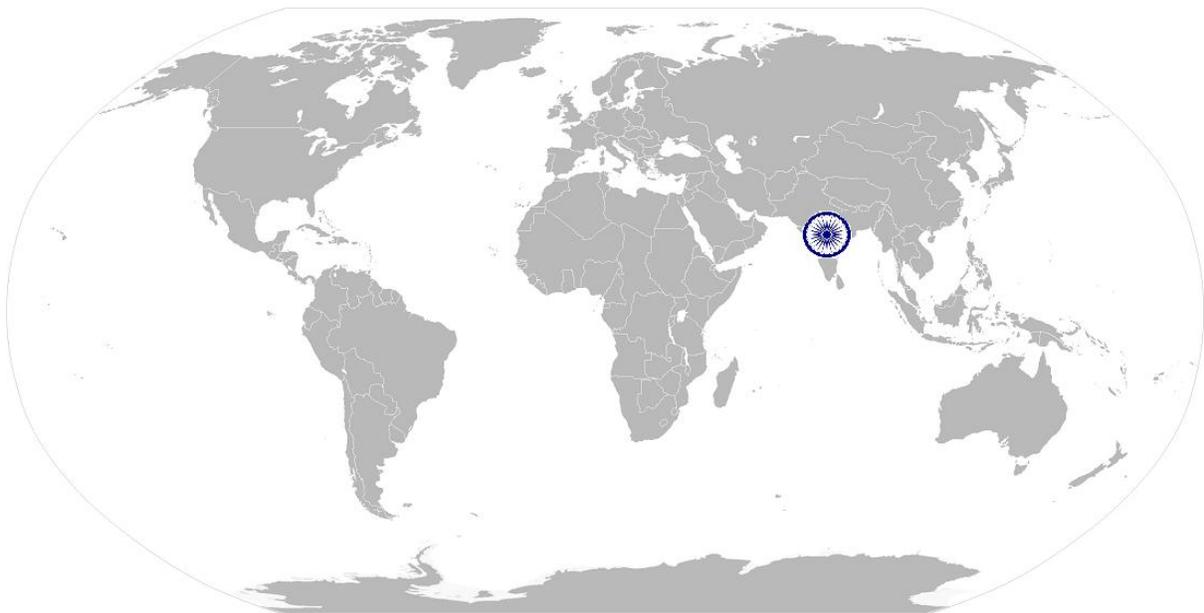
	SB10. work effectively with colleagues and other teams SB11. treat other cultures with respect
<b>C. Technical Skills</b>	You need to know and understand how to: SC1. identify and refer anomalies SC2. help reach agreements with colleagues SC3. keep up to date with changes, procedures and practices in your role



<b>NOS Code</b>	<b>SSC/N9002</b>		
<b>Credits (NSQF) [OPTIONAL]</b>	<b>TBD</b>	<b>Version number</b>	<b>1.0</b>
<b>Industry</b>	<b>IT-ITeS</b>	<b>Drafted on</b>	<b>30/04/2013</b>
<b>Industry Sub-sector</b>	<b>Business Process Managements</b>	<b>Last reviewed on</b>	<b>31/03/2018</b>
		<b>Next review date</b>	<b>31/03/2019</b>



# National Occupational Standard



## Overview

This unit is about monitoring the working environment and making sure it meets requirements for health, safety and security.

Maintain a healthy, safe and secure working environment

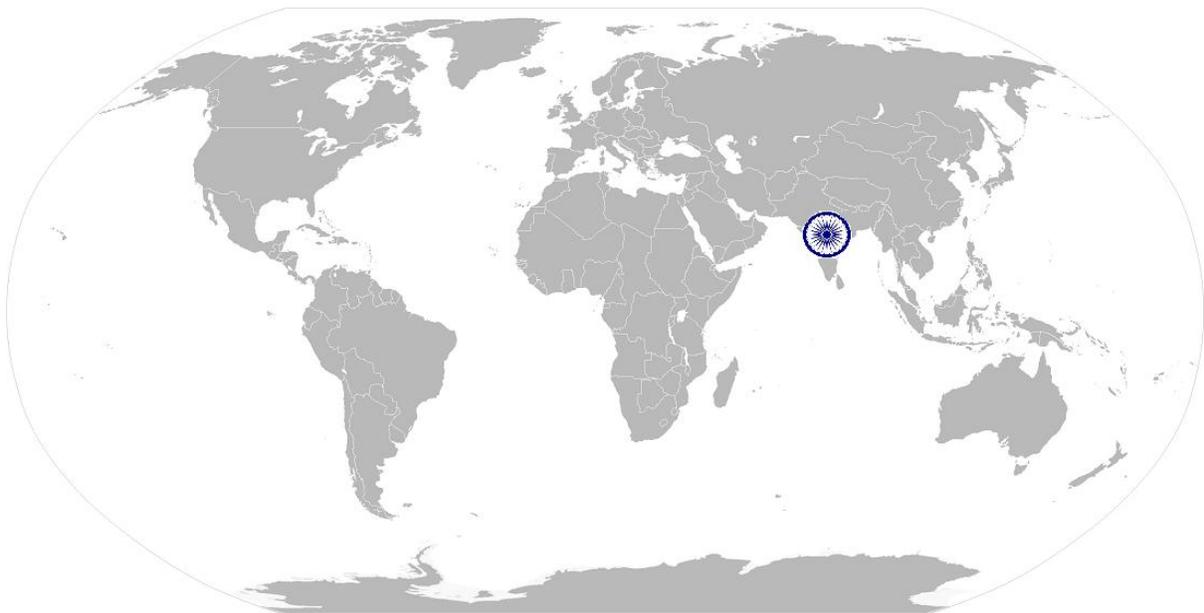
Applicable NOS Unit	<b>Unit Code</b>	SSC/N9003
	<b>Unit Title (Task)</b>	Maintain a healthy, safe and secure working environment
	<b>Description</b>	This unit is about monitoring your working environment and making sure it meets requirements for health, safety and security.
	<b>Scope</b>	This unit/task covers the following: <b>Emergency procedures:</b> <ul style="list-style-type: none"> <li>• illness</li> <li>• accidents</li> <li>• fires</li> <li>• other reasons to evacuate the premises</li> <li>• breaches of security</li> </ul>
<b>Performance Criteria (PC) w.r.t. the Scope</b>		
	<p>To be competent, you must be able to:</p> <p>PC1. comply with your organization's current health, safety and security policies and procedures</p> <p>PC2. report any identified breaches in health, safety, and security policies and procedures to the designated person</p> <p>PC3. identify and correct any hazards that you can deal with safely, competently and within the limits of your authority</p> <p>PC4. report any hazards that you are not competent to deal with to the relevant person in line with organizational procedures and warn other people who may be affected</p> <p>PC5. follow your organization's <b>emergency procedures</b> promptly, calmly, and efficiently</p> <p>PC6. identify and recommend opportunities for improving health, safety, and security to the designated person</p> <p>PC7. complete any health and safety records legibly and accurately</p>	
<b>Knowledge and Understanding (K)</b>		
<b>A. Organizational Context</b> (Knowledge of the company/ organization and its processes)	<p>You need to know and understand:</p> <p>KA1. legislative requirements and organization's procedures for health, safety and security and your role and responsibilities in relation to this</p> <p>KA2. what is meant by a hazard, including the different types of health and safety hazards that can be found in the workplace</p> <p>KA3. how and when to report hazards</p> <p>KA4. limits of your responsibility for dealing with hazards</p> <p>KA5. your organization's <b>emergency procedures</b> for different emergency situations and the importance of following these</p> <p>KA6. the importance of maintaining high standards of health, safety and security</p> <p>KA7. implications that any non-compliance with health, safety and security may have on individuals and the organization</p>	

**Maintain a healthy, safe and secure working environment**

<p><b>B. Technical Knowledge</b></p>	<p>You need to know and understand:</p> <p>KB1. different types of breaches in health, safety and security and how and when to report these</p> <p>KB2. evacuation procedures for workers and visitors</p> <p>KB3. how to summon medical assistance and the emergency services, where necessary</p> <p>KB4. how to use the health, safety and accident reporting procedures and the importance of these</p> <p>KB5. government agencies in the areas of safety, health and security and their norms and services</p>
<p><b>Skills (S)</b></p>	
<p><b>A. Core Skills/ Generic Skills</b></p>	<p><b>Writing Skills</b></p> <p>You need to know and understand how to:</p> <p>SA1. complete accurate, well written work with attention to detail</p> <p><b>Reading Skills</b></p> <p>You need to know and understand how to:</p> <p>SA2. read instructions, guidelines, procedures, rules and service level agreements</p> <p><b>Oral Communication (Listening and Speaking skills)</b></p> <p>You need to know and understand how to:</p> <p>SA3. listen effectively and orally communicate information accurately</p>
<p><b>B. Professional Skills</b></p>	<p><b>Decision Making</b></p> <p>You need to know and understand how to:</p> <p>SB1. make a decision on a suitable course of action</p> <p><b>Plan and Organize</b></p> <p>You need to know and understand how to:</p> <p>SB2. plan and organize your work to meet health, safety and security requirements</p> <p><b>Customer Centricity</b></p> <p>You need to know and understand how to:</p> <p>SB3. build and maintain positive and effective relationships with colleagues and customers</p> <p><b>Problem Solving</b></p> <p>You need to know and understand how to:</p> <p>SB4. apply problem solving approaches in different situations</p> <p><b>Analytical Thinking</b></p> <p>You need to know and understand how to:</p> <p>SB5. analyze data and activities</p> <p><b>Critical Thinking</b></p> <p>You need to know and understand how to:</p> <p>SB6. apply balanced judgments to different situations</p>

**Maintain a healthy, safe and secure working environment**

	<b>Attention to Detail</b>
	You need to know and understand how to: SB7. check your work is complete and free from errors SB8. get your work checked by peers
	<b>Team Working</b>
	You need to know and understand how to: SB9. work effectively in a team environment
<b>C. Technical Skills</b>	You need to know and understand how to: SC1. identify and refer anomalies SC2. help reach agreements with colleagues SC3. keep up to date with changes, procedures and practices in your role

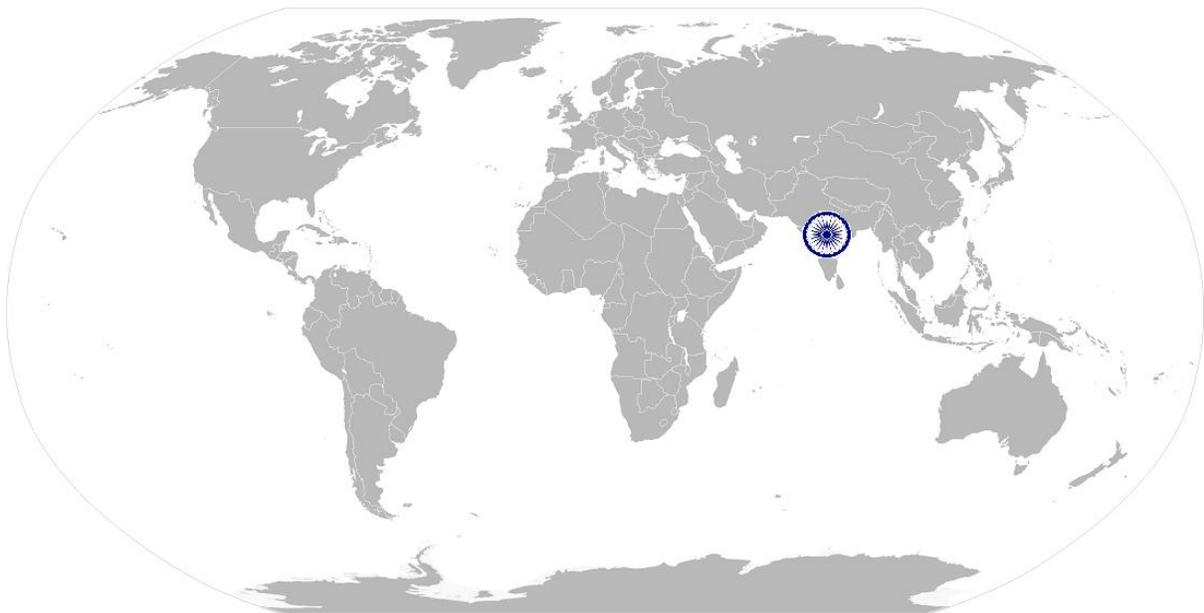


**Maintain a healthy, safe and secure working environment**

<b>NOS Code</b>	<b>SSC/N9003</b>		
<b>Credits (NSQF) [OPTIONAL]</b>	<b>TBD</b>	<b>Version number</b>	<b>1.0</b>
<b>Industry</b>	<b>IT-ITeS</b>	<b>Drafted on</b>	<b>30/04/2013</b>
<b>Industry Sub-sector</b>	<b>Business Process Managements</b>	<b>Last reviewed on</b>	<b>31/03/2018</b>
		<b>Next review date</b>	<b>31/03/2019</b>



# National Occupational Standard



## Overview

This unit is about providing specified data/information related to your work in templates or other standard formats



SSC/N9004

Provide data/information in standard formats

Applicable NOS Unit

Unit Code	SSC/N9004
Unit Title (Task)	Provide data/information in standard formats
Description	This unit is about providing specified data/information related to your work in templates or other standard formats.
Scope	<p>This unit/task covers the following:</p> <p><b>Appropriate people:</b></p> <ul style="list-style-type: none"> <li>• line manager</li> <li>• members of your own work group</li> <li>• people in other work groups in your organization</li> <li>• subject matter experts</li> </ul> <p><b>Data/information:</b></p> <ul style="list-style-type: none"> <li>• quantitative</li> <li>• qualitative</li> </ul> <p><b>Sources:</b></p> <ul style="list-style-type: none"> <li>• within your organization</li> <li>• outside your organization</li> </ul> <p><b>Formats:</b></p> <ul style="list-style-type: none"> <li>• paper-based</li> <li>• electronic</li> </ul>
<b>Performance Criteria (PC) w.r.t. the Scope</b>	
	<p>To be competent, you must be able to:</p> <p>PC1. establish and agree with <b>appropriate people</b> the <b>data/information</b> you need to provide, the <b>formats</b> in which you need to provide it, and when you need to provide it</p> <p>PC2. obtain the <b>data/information</b> from reliable <b>sources</b></p> <p>PC3. check that the <b>data/information</b> is accurate, complete and up-to-date</p> <p>PC4. obtain advice or guidance from <b>appropriate people</b> where there are problems with the <b>data/information</b></p> <p>PC5. carry out rule-based analysis of the <b>data/information</b>, if required</p> <p>PC6. insert the <b>data/information</b> into the agreed <b>formats</b></p> <p>PC7. check the accuracy of your work, involving colleagues where required</p> <p>PC8. report any unresolved anomalies in the <b>data/information</b> to <b>appropriate people</b></p> <p>PC9. provide complete, accurate and up-to-date data/information to the <b>appropriate people</b> in the required <b>formats</b> on time</p>
<b>Knowledge and Understanding (K)</b>	
<b>A. Organizational Context</b>	You need to know and understand:

SSC/N9004

Provide data/information in standard formats

<p>(Knowledge of the company/ organization and its processes)</p>	<p>KA1. your organization's procedures and guidelines for providing data/information in standard formats and your role and responsibilities in relation to this</p> <p>KA2. the knowledge management culture of your organization</p> <p>KA3. your organization's policies and procedures for recording and sharing information and the importance of complying with these</p> <p>KA4. the importance of validating data/information before use and how to do this</p> <p>KA5. procedures for updating data in appropriate formats and with proper validation</p> <p>KA6. the purpose of the CRM database</p> <p>KA7. how to use the CRM database to record and extract information</p> <p>KA8. the importance of having your data/information reviewed by others</p> <p>KA9. the scope of any data/information requirements including the level of detail required</p> <p>KA10. the importance of keeping within the scope of work and adhering to timescales</p>
<p><b>B. Technical Knowledge</b></p>	<p>You need to know and understand:</p> <p>KB1. data/information you may need to provide including the sources and how to do this</p> <p>KB2. templates and formats used for data/information including their purpose and how to use these</p> <p>KB3. different techniques used to obtain data/information and how to apply</p> <p>KB4. these</p> <p>KB5. how to carry out rule-based analysis on the data/information</p> <p>KB6. typical anomalies that may occur in data/information</p> <p>KB7. who to go to in the event of inaccurate data/information and how to report this</p>
<p><b>Skills (S)</b></p>	
<p><b>A. Core Skills/ Generic Skills</b></p>	<p><b>Writing Skills</b></p> <p>You need to know and understand how to:</p> <p>SA1. complete accurate, well written work with attention to detail</p> <p><b>Reading Skills</b></p> <p>You need to know and understand how to:</p> <p>SA2. read instructions, guidelines, procedures, rules and service level agreements</p> <p><b>Oral Communication (Listening and Speaking skills)</b></p> <p>You need to know and understand how to:</p> <p>SA3. listen effectively and orally communicate information accurately</p>
<p><b>B. Professional Skills</b></p>	<p><b>Decision Making</b></p> <p>You need to know and understand how to:</p> <p>SB1. follow rule-based decision-making processes</p> <p>SB2. make a decision on a suitable course of action</p>

**Provide data/information in standard formats**

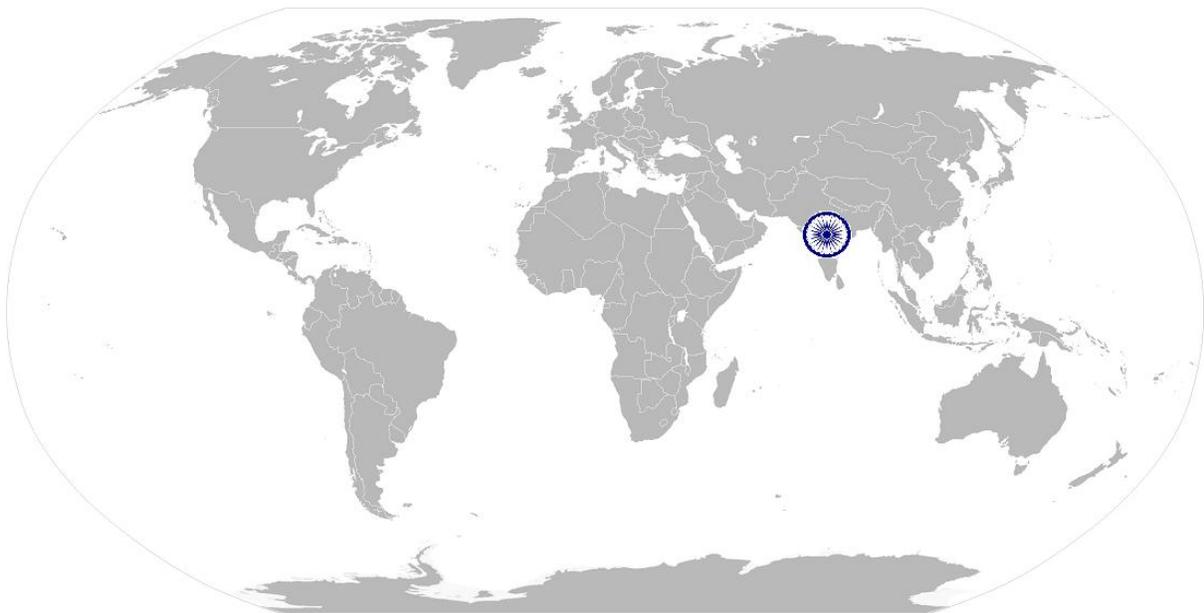
	<b>Plan and Organize</b>
	You need to know and understand how to: SB3. plan and organize your work to achieve targets and deadlines
	<b>Customer Centricity</b>
	You need to know and understand how to: SB4. check that your own work meets customer requirements SB5. meet and exceed customer expectations
	<b>Problem Solving</b>
	You need to know and understand how to: SB6. apply problem solving approaches in different situations
	<b>Analytical Thinking</b>
	You need to know and understand how to: SB7. configure data and disseminate relevant information to others
	<b>Critical Thinking</b>
	You need to know and understand how to: SB8. apply balanced judgments to different situations
	<b>Attention to Detail</b>
You need to know and understand how to: SB9. check your work is complete and free from errors SB10. get your work checked by peers	
<b>Team Working</b>	
You need to know and understand how to: SB11. work effectively in a team environment	
<b>C. Technical Skills</b>	You need to know and understand how to: SC1. use information technology effectively, to input and/or extract data accurately SC2. validate and update data SC3. identify and refer anomalies in data SC4. store and retrieve information SC5. share information using standard formats and templates SC6. keep up to date with changes, procedures and practices in your role

**Provide data/information in standard formats**

<b>NOS Code</b>	<b>SSC/N9004</b>		
<b>Credits (NSQF) [OPTIONAL]</b>	<b>TBD</b>	<b>Version number</b>	<b>1.0</b>
<b>Industry</b>	<b>IT-ITeS</b>	<b>Drafted on</b>	<b>30/04/2013</b>
<b>Industry Sub-sector</b>	<b>Business Process Managements</b>	<b>Last reviewed on</b>	<b>31/03/2018</b>
		<b>Next review date</b>	<b>31/03/2019</b>



# National Occupational Standard



## Overview

This unit is about taking action to ensure you have the knowledge and skills you need to perform competently in your current job role and to take on new responsibilities, where required.

SSC/N9005

Develop your knowledge, skills and competence

Applicable NOS Unit

Unit Code	SSC/N9005
Unit Title (Task)	Develop your knowledge, skills and competence
Description	<p>This unit is about taking action to ensure you have the knowledge and skills you need to perform competently in your current job role and to take on new responsibilities, where required.</p> <p><i>Competence</i> is defined as: the application of knowledge and skills to perform to the standards required.</p>
Scope	<p>This unit/task covers the following:</p> <p><b>Appropriate people</b> may be:</p> <ul style="list-style-type: none"> <li>• line manager</li> <li>• human resources specialists</li> <li>• learning and development specialists</li> <li>• peers</li> </ul> <p><b>Job role:</b></p> <ul style="list-style-type: none"> <li>• current responsibilities as defined in your job description</li> <li>• possible future responsibilities</li> </ul> <p><b>Learning and development activities:</b></p> <ul style="list-style-type: none"> <li>• formal education and training programs leading to certification</li> <li>• non-formal activities (such as private study, learning from colleagues, project work), designed to meet learning and development objectives but without certification</li> </ul> <p><b>Appropriate action</b> may be:</p> <ul style="list-style-type: none"> <li>• undertaking further learning and development activities</li> <li>• finding further opportunities to apply your knowledge and skills</li> </ul>
<b>Performance Criteria (PC) w.r.t. the Scope</b>	
	<p>To be competent, you must be able to:</p> <p>PC1. obtain advice and guidance from <b>appropriate people</b> to develop your knowledge, skills and competence</p> <p>PC2. identify accurately the knowledge and skills you need for your <b>job role</b></p> <p>PC3. identify accurately your current level of knowledge, skills and competence and any learning and development needs</p> <p>PC4. agree with <b>appropriate people</b> a plan of <b>learning and development activities</b> to address your learning needs</p> <p>PC5. undertake <b>learning and development activities</b> in line with your plan</p> <p>PC6. apply your new knowledge and skills in the workplace, under supervision</p> <p>PC7. obtain feedback from <b>appropriate people</b> on your knowledge and skills and how effectively you apply them</p>

	PC8. review your knowledge, skills and competence regularly and take <b>appropriate action</b>
<b>Knowledge and Understanding (K)</b>	
<b>A. Organizational Context</b> (Knowledge of the company/ organization and its processes)	<p>You need to know and understand:</p> <p>KA1. your organization's procedures and guidelines for developing your knowledge, skills and competence and your role and responsibilities in relation to this</p> <p>KA2. the importance of developing your knowledge, skills and competence to you and your organization</p> <p>KA3. different methods used by your organization to review skills and knowledge including:</p> <ul style="list-style-type: none"> <li>• training need analysis</li> <li>• skills need analysis</li> <li>• performance appraisals</li> </ul> <p>KA4. how to review your knowledge and skills against your job role using different methods and analysis</p> <p>KA5. different types of learning and development activities available for your job role and how to access these</p> <p>KA6. how to produce a plan to address your learning and development needs, who to agree it with and the importance of undertaking the planned activities</p> <p>KA7. different types of support available to help you plan and undertake learning and development activities and how to access these</p> <p>KA8. why it is important to maintain records of your learning and development</p> <p>KA9. methods of obtaining and accepting feedback from appropriate people on your knowledge skills and competence</p> <p>KA10. how to use feedback to develop in your job role</p>
<b>B. Technical Knowledge</b>	<p>You need to know and understand:</p> <p>KB1. the knowledge and skills required in your job role</p> <p>KB2. your current learning and development needs in relation to your job role</p> <p>KB3. different types of learning styles and methods including those that help you learn best</p> <p>KB4. the importance of taking responsibility for your own learning and development</p> <p>KB5. to the importance of learning and practicing new concepts, theory and how to apply these in the work environment or on samples.</p> <p>KB6. how to explore sample problems and apply solutions</p>
<b>Skills (S)</b>	
<b>A. Core Skills/ Generic Skills</b>	<b>Writing Skills</b>
	<p>You need to know and understand how to:</p> <p>SA1. communicate with colleagues in writing</p>

**Develop your knowledge, skills and competence**

	<p><b>Reading Skills</b></p> <p>You need to know and understand how to:          SA2. read instructions, guidelines and procedures</p> <p><b>Oral Communication (Listening and Speaking skills)</b></p> <p>You need to know and understand how to:          SA3. ask for clarification and advice from line managers</p>
<b>B. Professional Skills</b>	<p><b>Decision Making</b></p> <p>You need to know and understand how to:          SB1. make a decision on a suitable course of action</p> <p><b>Plan and Organize</b></p> <p>You need to know and understand how to:          SB2. plan and organize your work to achieve targets and deadlines</p> <p><b>Customer Centricity</b></p> <p>You need to know and understand how to:          SB3. check that your own work meets customer requirements</p> <p><b>Problem Solving</b></p> <p>You need to know and understand how to:          SB4. refer anomalies to the line manager</p> <p><b>Analytical Thinking</b></p> <p>You need to know and understand how to:          SB5. analyze data and activities</p> <p><b>Critical Thinking</b></p> <p>You need to know and understand how to:          SB6. apply balanced judgments to different situations</p> <p><b>Attention to Detail</b></p> <p>You need to know and understand how to:          SB7. check your work is complete and free from errors          SB8. get your work checked by peers</p> <p><b>Team Working</b></p> <p>You need to know and understand how to:          SB9. work effectively in a team environment</p>
	<p><b>C. Technical Skills</b></p> <p>You need to know and understand how to:          SC1. use information technology effectively          SC2. agree objectives and work requirements          SC3. keep up to date with changes, procedures and practices in your role</p>

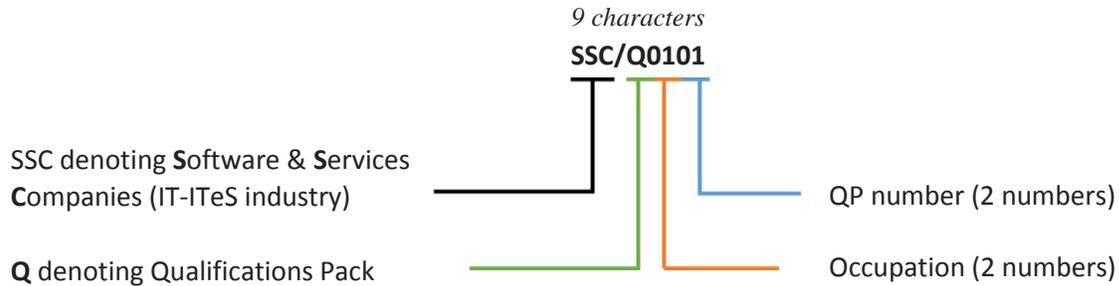
Develop your knowledge, skills and competence

<b>NOS Code</b>	<b>SSC/N9005</b>		
<b>Credits (NSQF) [OPTIONAL]</b>	<b>TBD</b>	<b>Version number</b>	<b>1.0</b>
<b>Industry</b>	<b>IT-ITeS</b>	<b>Drafted on</b>	<b>30/04/2013</b>
<b>Industry Sub-sector</b>	<b>Business Process Managements</b>	<b>Last reviewed on</b>	<b>31/03/2018</b>
		<b>Next review date</b>	<b>31/03/2019</b>

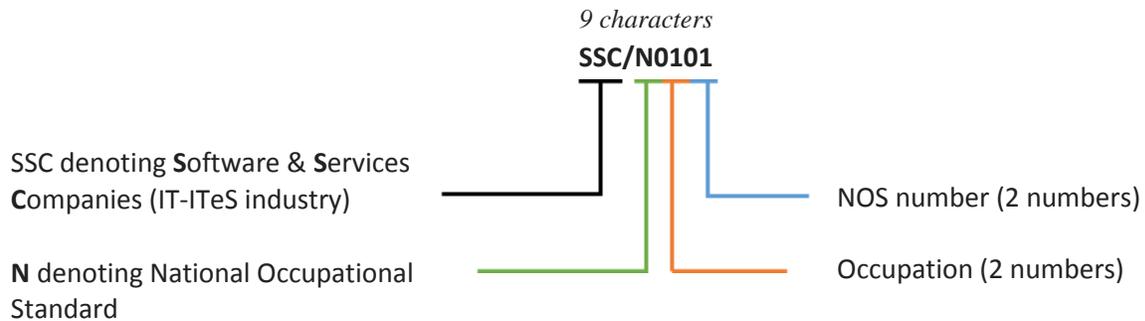


## Nomenclature for QP and NOS Units

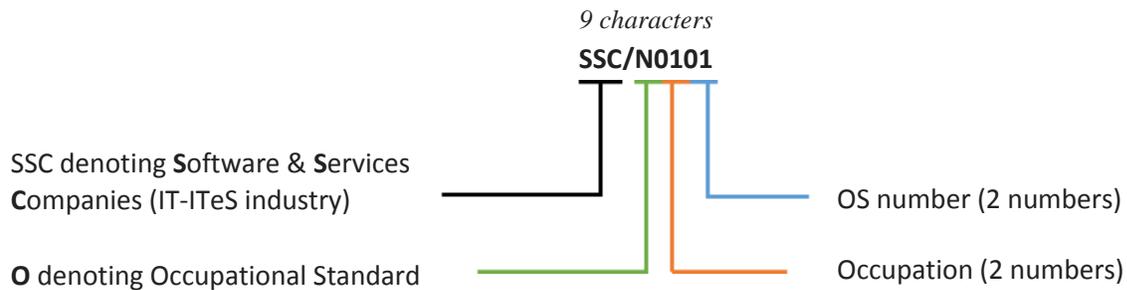
### Qualifications Pack



### National Occupational Standard



### Occupational Standard



It is important to note that an OS unit can be denoted with either an 'O' or an 'N'.

- If an OS unit denotes 'O', it is an OS unit that is an international standard. An example of OS unit denoting 'O' is SSC/O0101.
- If an OS unit denotes 'N', it is an OS unit that is a national standard and is applicable only for the Indian IT-ITeS industry. An example of OS unit denoting 'N' is SSC/N0101

*Nomenclature for QP and NOS Units*

The following acronyms/codes have been used in the nomenclature above:

Sub-Sector	Range of Occupation numbers
IT Service (ITS)	01-20
Business Process Management (BPM)	21-40
Engg. and R&D (ERD)	41-60
Software Products (SPD)	61-80

Sequence	Description	Example
Three letters	Industry name (Software & Service Companies )	SSC
Slash	/	/
Next letter	Whether QP or NOS	N
Next two numbers	Occupation Code	01
Next two numbers	OS number	01

*Criteria for Assessment of Trainees*

**Job Role** Associate – Transactional F&A

**Qualification Pack** SSC/Q2301

**Sector Skill Council** IT-ITes

**Guidelines for Assessment:**

1. Criteria for assessment for each Qualification Pack (QP) will be created by the Sector Skill Council (SSC). Each performance criteria (PC) will be assigned Theory and Skill/Practical marks proportional to its importance in NOS.
2. The assessment will be conducted online through assessment providers authorised by SSC.
3. Format of questions will include a variety of styles suitable to the PC being tested such as multiple choice questions, fill in the blanks, situational judgment test, simulation and programming test.
4. To pass a QP, a trainee should pass each individual NOS. Standard passing criteria for each NOS is 70%.
5. For latest details on the assessment criteria, please visit [www.sscnasscom.com](http://www.sscnasscom.com).

Assessable Outcomes	Assessment criteria for the outcome	Marks Allocation			
		Total Mark	Out of	Theory	Skills Practical
<b>1. SSC/N2302 (Process invoices, credit notes and claims)</b>	PC1. check systems to verify whether invoices and claims have already been received and recorded	<b>100</b>	5	0	5
	PC2. validate invoices against purchase orders (POs) and/or other documentation received and assign appropriate codes		15	5	10
	PC3. validate vendor credit notes against relevant invoices and assign appropriate codes		5	0	5
	PC4. validate expense items against relevant expense policies and assign appropriate codes		5	0	5
	PC5. identify any issues with invoices, credit notes and claims and clarify these with relevant vendors or personnel/employees		5	0	5
	PC6. enter invoices, credit notes and claims into your organization's systems, following your organization's policies, procedures, guidelines and client specific SLAs		30	10	20
	PC7. check processing of invoices, credit notes and claims with peers and/or supervisor, as required		10	0	10
	PC8. submit entered invoices and claims for review and approval by appropriate people		5	5	0
	PC9. update invoices and claims in your organization's systems in case of changes		5	0	5



*Criteria for assessment of Trainees*

	PC10. reconcile invoices, credit notes and claims against system entries on a periodic basis, as required		5	0	5
	PC11. obtain advice and guidance from appropriate people, where required		5	5	0
	PC12. comply with your organization's policies, procedures, guidelines and client-		5	0	5
		<b>Total</b>	100	25	75
<b>2. SSC/N2303 (Pay invoices and claims)</b>	PC1. check systems to verify whether approved invoices and claims have already been paid	<b>100</b>	5	0	5
	PC2. carry out random checks on approved invoices and claims, as required		15	5	10
	PC3. identify any issues with approved invoices and claims and clarify these with appropriate people		5	0	5
	PC4. prepare batches of invoices and claims for pay-run , following your organization's policies, procedures, guidelines and client-specific SLAs		30	10	20
	PC5. check pay-run with peers and/or supervisor, as required		5	5	0
	PC6. submit pay-run for review and approval by appropriate people		5	5	0
	PC7. respond promptly to payment queries from vendors and personnel/ employees referred by the accounts payable helpdesk		5	0	5
	PC8. reconcile payments against bank statements on a periodic basis, as required		10	0	10
	PC9. liaise effectively with banks regarding any queries about reconciliation or non-receipt of authorized payments		10	0	10
	PC10. obtain advice and guidance from appropriate people, where required		5	5	0
	PC11. comply with your organization's policies, procedures, guidelines and client-specific SLAs when paying invoices and claims		5	0	5
		<b>Total</b>	100	30	70
<b>3. SSC/N2304 (Deal with queries at the accounts payable helpdesk)</b>	PC1. greet helpdesk users and verify their details, following your organization's procedures	<b>100</b>	10	5	5
	PC2. listen carefully to helpdesk users and ask appropriate questions to understand the nature of their queries		5	0	5
	PC3. summarize and obtain confirmation from helpdesk users of your understanding of their queries		10	5	5
	PC4. express your concern for any difficulties caused and your commitment to resolving their queries		10	5	5



*Criteria for assessment of Trainees*

	PC5. record and categorize queries accurately using your organization's query management tool		10	5	5
	PC6. obtain relevant information from the accounts payable system and communicate this information clearly to helpdesk users		10	5	5
	PC7. refer queries that cannot be dealt with by reference to the accounts payable system promptly to appropriate people		5	0	5
	PC8. provide helpdesk users with a justifiable estimate of time to respond to their queries, where an immediate response cannot be given		5	0	5
	PC9. monitor resolution of queries to keep helpdesk users informed about progress and any delays in resolving their queries		5	0	5
	PC10. obtain confirmation from helpdesk users that their queries have been resolved to their satisfaction		10	5	5
	PC11. record the resolution of queries accurately using your organization's query management tool		10	5	5
	PC12. comply with relevant standards, policies, procedures, guidelines and service		10	0	10
		<b>Total</b>	100	35	65
<b>4. SSC/N2305 (Maintain customer accounts)</b>	PC1. check systems to verify whether master records of customers already exist		10	0	10
	PC2. obtain required data/information from appropriate sources to set up and update customer accounts		15	5	10
	PC3. clarify any issues with the data/information either from the sales team or directly with customers, as required		5	0	5
	PC4. carry out credit checks on customers, following your organization's procedures, guidelines and client-specific service level agreements (SLAs)		20	0	20
	PC5. set up and update customer accounts, following your organization's procedures, guidelines and client-specific service level agreements (SLAs)	<b>100</b>	25	5	20
	PC6. obtain confirmation from customers that the details held in their master records are correct		10	5	5
	PC7. obtain advice and guidance from appropriate people, where required		5	0	5
	PC8. comply with your organization's policies, procedures, guidelines and client-specific SLAs when maintaining customer accounts		10	0	10
		<b>Total</b>	100	15	85

*Criteria for assessment of Trainees*

<b>5. SSC/N2306 (Generate invoices and credit notes)</b>	PC1. obtain requests to generate invoices, credit notes and full supporting documentation from sales teams	<b>100</b>	5	0	5
	PC2. check systems to verify whether invoices/credit notes have already been generated		10	0	10
	PC3. validate requests to generate invoices/credit notes against relevant purchase orders, contracts and terms of business		10	5	5
	PC4. clarify any issues with requests to generate invoices/credit notes with appropriate people		10	0	10
	PC5. enter data for generating invoices/credit notes into your organization's systems, following your organization's policies, procedures, guidelines and client-specific SLAs		30	10	20
	PC6. check generation of invoices/credit notes with peers and/or supervisor, as required		2.5	2.5	0
	PC7. submit entered invoices/credit notes for review and approval by appropriate people		2.5	2.5	0
	PC8. update invoices/credit notes in your organization's systems in case of changes		5	0	5
	PC9. send invoices/credit notes to appropriate people for signature, where required		2.5	2.5	0
	PC10. send invoices/credit notes to customers and confirm receipt, where required		2.5	2.5	0
	PC11. reconcile invoices/credit notes against system entries on a periodic basis, as required		5	0	5
	PC12. obtain advice and guidance from appropriate people, where required		5	5	0
	PC13. comply with your organization's policies, procedures, guidelines and client-specific SLAs when generating invoices and credit notes		10	0	10
	<b>Total</b>	<b>100</b>	<b>30</b>	<b>70</b>	
<b>6. SSC/N2307 (Receive payments and apply cash)</b>	PC1. verify the sources and amounts of payments received	<b>100</b>	10	10	0
	PC2. record payments received in your organization's systems, following your organization's policies, procedures, guidelines and client-specific SLAs		30	10	20
	PC3. identify the invoices/credit notes to which receipts relate in order to allocate payments correctly		10	0	10
	PC4. direct receipts into relevant bank accounts, following your organization's policies, procedures, guidelines and client-specific SLAs		10	0	10
	PC5. identify any issues with payments from customers and clarify these with appropriate people		10	0	10



*Criteria for assessment of Trainees*

	PC6. respond promptly to payment queries from customers referred by the accounts receivable helpdesk		5	0	5
	PC7. reconcile receipts against bank statements on a periodic basis, as required		5	0	5
	PC8. liaise effectively with banks regarding any queries about reconciliation of receipts		5	0	5
	PC9. obtain advice and guidance from appropriate people, where required		5	5	0
	PC10. comply with your organization's policies, procedures, guidelines and client-specific SLAs when receiving payments and applying cash		10	0	10
		<b>Total</b>	100	25	75
<b>7. SSC/N2309 (Deal with queries at the accounts receivable helpdesk)</b>	PC1. greet customers and verify their details, following your organization's procedures		10	5	5
	PC2. listen carefully to customers and ask appropriate questions to understand the nature of their queries		5	0	5
	PC3. summarize and obtain confirmation from customers of your understanding of their queries		7.5	2.5	5
	PC4. express your concern for any difficulties caused and your commitment to resolving their queries		10	5	5
	PC5. record and categorize queries accurately using your organization's query management tool		10	5	5
	PC6. obtain relevant information from the accounts receivable system and communicate this information clearly to customers		10	5	5
	PC7. confirm with customers their commitment to make timely payments, where required	<b>100</b>	5	0	5
	PC8. refer queries that cannot be dealt with by reference to the accounts receivable system promptly to appropriate people		5	0	5
	PC9. provide customers with a justifiable estimate of time to respond to their queries, where an immediate response cannot be given		5	0	5
	PC10. monitor resolution of queries to keep customers informed about progress and any delays in resolving their queries		5	0	5
	PC11. obtain confirmation from customers that their queries have been resolved to their satisfaction		7.5	2.5	5
	PC12. record the resolution of queries accurately using your organization's query management tool		10	5	5
	PC13. comply with relevant standards, policies, procedures, guidelines and service level		10	0	10

*Criteria for assessment of Trainees*

	agreements (SLAs) when dealing with queries at the accounts				
		<b>Total</b>	100	30	70
<b>8. SSC/N9001 (Manage your work to meet requirements)</b>	PC1. establish and agree your <b>work requirements</b> with <b>appropriate people</b>	<b>100</b>	7.5	0	7.5
	PC2. keep your immediate work area clean and tidy		15	7.5	7.5
	PC3. utilize your time effectively		15	7.5	7.5
	PC4. use <b>resources</b> correctly and efficiently		15	7.5	7.5
	PC5. treat confidential information correctly		7.5	0	7.5
	PC6. work in line with your organization's policies and procedures		15	0	15
	PC7. work within the limits of your job role		7.5	0	7.5
	PC8. obtain guidance from <b>appropriate people</b> , where necessary		7.5	0	7.5
	PC9. ensure your work meets the agreed requirements		10	0	10
		<b>Total</b>	100	22.5	77.5
<b>9.SSC/N9002 (Work effectively with colleagues)</b>	PC1. communicate with colleagues clearly, concisely and accurately	<b>100</b>	20	0	20
	PC2. work with colleagues to integrate your work effectively with theirs		10	0	10
	PC3. pass on essential information to colleagues in line with organizational requirements		10	10	0
	PC4. work in ways that show respect for colleagues		20	0	20
	PC5. carry out commitments you have made to colleagues		10	0	10
	PC6. let colleagues know in good time if you cannot carry out your commitments, explaining the reasons		10	10	0
	PC7. identify any problems you have working with colleagues and take the initiative to solve these problems		10	0	10
	PC8. follow the organization's policies and procedures for working with colleagues		10	0	10
		<b>Total</b>	100	20	80
<b>10.SSC/N9003 (Maintain a healthy, safe and secure working environment)</b>	PC1. comply with your organization's current health, safety and security policies and procedures	<b>100</b>	20	10	10
	PC2. report any identified breaches in health, safety, and security policies and procedures to the designated person		10	0	10



*Criteria for assessment of Trainees*

	PC3. identify and correct any hazards that you can deal with safely, competently and within the limits of your authority		20	10	10
	PC4. report any hazards that you are not competent to deal with to the relevant person in line with organizational procedures and warn other people who may be affected		10	0	10
	PC5. follow your organization's <b>emergency procedures</b> promptly, calmly, and efficiently		20	10	10
	PC6. identify and recommend opportunities for improving health, safety, and security to the designated person		10	0	10
	PC7. complete any health and safety records legibly and accurately		10	0	10
		<b>Total</b>	<b>100</b>	<b>30</b>	<b>70</b>
<b>11.SSC/N9004 (Provide data/information in standard formats)</b>	PC1. establish and agree with appropriate people the data/information you need to provide, the formats in which you need to provide it, and when you need to provide it	<b>100</b>	15	15	0
	PC2. obtain the data/information from reliable sources		15	0	15
	PC3. check that the data/information is accurate, complete and up-to-date		15	5	10
	PC4. obtain advice or guidance from appropriate people where there are problems with the data/information		5	5	0
	PC5. carry out rule-based analysis of the data/information, if required		20	0	20
	PC6. insert the data/information into the agreed formats		10	0	10
	PC7. check the accuracy of your work, involving colleagues where required		10	0	10
	PC8. report any unresolved anomalies in the data/information to appropriate people		5	5	0
	PC9. provide complete, accurate and up-to-date data/information to the appropriate people in the required formats on time		5	0	5
		<b>Total</b>	<b>100</b>	<b>30</b>	<b>70</b>
<b>12.SSC/N9005 (Develop your knowledge, skills and competence)</b>	PC1. obtain advice and guidance from appropriate people to develop your knowledge, skills and competence	<b>100</b>	20	7	13
	PC2. identify accurately the knowledge and skills you need for your job role		14	7	7
	PC3. identify accurately your current level of knowledge, skills and competence and any learning and development needs		14	0	14
	PC4. agree with appropriate people a plan of learning and development activities to address your learning needs		7	0	7

*Criteria for assessment of Trainees*

	PC5. undertake learning and development activities in line with your plan		12	0	12
	PC6. apply your new knowledge and skills in the workplace, under supervision		12	0	12
	PC7. obtain feedback from appropriate people on your knowledge and skills and how effectively you apply them		7	0	7
	PC8. review your knowledge, skills and competence regularly and take appropriate action		14	7	7
		<b>Total</b>	100	21	79