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| **NZQA Assessment Support Material** |

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| **Unit standard** **1285** | | | | | |
| **Title** | Make inquiries and complete practical transactions | | | | |
| **Level** | 1 | **Credits** | 4 | **Version** | 5 |

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| **Vocational pathways** | Manufacturing and Technology; Primary Industries; Social and Community Services |

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| **Assessor guidelines** |

**Introduction**

The following guidelines are supplied to enable assessors to carry out valid and consistent assessment using this internal assessment resource.

As with all assessment resources, education providers will need to follow their own quality control processes. Assessors must manage authenticity for any assessment from a public source, because learners may have access to the assessment schedule or exemplar material. Using this assessment resource without modification may mean that learners' work is not authentic. The assessor/educator may need to change figures, measurements or data sources or set a different context or topic. Assessors need to consider the local context in which learning is taking place and its relevance for learners.

Assessors need to be very familiar with the outcome being assessed by the unit standard. The performance criteria and the special notes contain information, definitions, and requirements that are crucial when interpreting the standard and assessing learners against it.

**Context/setting**

This activity requires learners to make at least two inquiries (one face-to-face and one by telephone) and at least two practical transactions (one face-to-face and one by telephone).

**Level of performance expected**

This is a level 1 standard. This means learners should be:

* Using basic general and/or foundation knowledge in theory questions;
* Applying basic solutions to simple problems and applying basic skills required to carry out simple tasks;
* Working in highly structured contexts, taking some responsibility for your own learning;
* Interacting with others.

**Conditions of assessment**

The scenarios provide a guide about the sorts of inquiries and transactions that are appropriate for assessment of this unit standard. Learners may substitute their own scenarios for one or more of the scenarios provided in the assessment.

* For element 1, at least two inquiries are required, one of which must be face-to-face and one of which must be by telephone.
* For element 2, at least two transactions are required, one of which must be face-to-face and one of which must be by telephone.

Ideally, people will be assessed in a *real-life context using naturally occurring evidence*. If this is the case, it is likely that the scenarios assessed will be different to the ones provided in this assessment.

Where a real-life context is not available, assessment can take place in a *simulated situation.* However, the conditions of this simulation must reflect as closely as possible to the situation that is being assessed.

In order to reflect the context, face-to-face inquiries with customers should involve actor customers making real inquiries that reflect that scenario. Learners should be asking real questions that are typical of that scenario and be provided with realistic and appropriate responses. Sample scenarios are provided and assessors are encouraged to develop scenarios as close as possible to individual learner’s situations.

In either case, the scenario should be described on the relevant recording sheet.

**Resource requirements**

Learners should not have access to workbooks and learning materials. However, documented policies and procedures or established protocols that relate to the scenario are allowed.

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| **Assessment Schedule** |

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|  | **Evidence for achieved** | **Judgements for achieved** |
| **Element 1** Make inquiries face-to-face and by telephone.  Range inquiries may include but are not limited to – requesting service from someone, making an enquiry over the telephone, making an appointment, finding out timetable information.  Evidence is required of at least two. | | |
| **Performance criteria**  1.1 Greeting is made in a manner that fits the situation and inquiry.  1.2 Needs are stated clearly and concisely, and checked with the recipient.  1.3 Questions relevant to the inquiry are asked to elicit the required information from the recipient.  1.4 Language is used and interaction is conducted in a manner that fits the context, medium, and relationship between the participants. | Task 1  * Telephone observer recording sheet * Practical inquiry observer recording sheet.   See sample answers for examples of appropriate responses. | Task 1  * One face-to-face enquiry and one telephone enquiry. * Observation recording sheet includes examples of learner actions that are appropriate and consistent with the nature of the enquiry. * Inquiry observation recording sheets (2) are signed and dated and workplace added (as appropriate). * Observation recording sheet is completed by a person in a supervisory or similar role with appropriate level of responsibility to confirm performance meets workplace standards and expectations. |
| **Element 2** Complete practical transactions face-to-face and by telephone.  Range transactions include but are not limited to – making bookings, ordering goods, banking transactions, applying for services, paying accounts.  Evidence is required of at least two. | | |
| **Performance criteria**  2.1 Greeting is made in a manner that fits the situation and inquiry.  2.2 Transaction requirements are stated clearly and concisely and checked with the recipients.  2.3 Questions relevant to the transaction are asked in a manner that elicits the required information from the recipient.  2.4 Language is used and transaction is conducted in a manner that fits the context, medium, and relationship between the participants.  2.5 Language used during the transaction fits the situation, and the message presented is clear, concise, and spontaneous. | Task 2  * Telephone transaction observer recording sheet * Practical transaction observer recording sheet.   See sample answers for examples of appropriate responses. | Task 2  * One face-to-face transaction and one telephone transaction. * Observation recording sheet includes examples of learner actions that are appropriate and consistent with the nature of the practical transaction. * Inquiry observation recording sheets (2) are signed and dated and workplace added (as appropriate). * Observation recording sheet is completed by a person in a supervisory or similar role with appropriate level of responsibility to confirm performance meets workplace standards and expectations. |

Judgements should be holistic, rather than based on a checklist approach.

Apprentice Electrician

Sample answers for unit standard 1285

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| Face-to-face Inquiry - Observer recording sheet |
| Assessor/workplace supervisor to describe the inquiry here  *Learner is an apprentice electrician and is assisting an electrician install some extra power points at a customer’s house. They have asked the customer to confirm exactly where they want the new power points to be.* |

*For each of the questions below, please give specific examples that provide evidence of how the learner made the inquiry:*

1. Provide a comment that shows the learner used a greeting appropriate to the situation and inquiry.

*Learner had already introduced themself on arrival at the customer’s house in the morning. Interrupted the customer – said “excuse me, is now a good time to show us exactly where you want the power points to be”.*

1. Provide a comment that shows the learner’s needs were stated clearly and concisely, and checked with the recipient.

*See comment above – interaction was to establish customer needed to come and show where the power points were supposed to go. Learner clarified with customer is now a good time.*

1. Give two examples of questions used by the learner to ensure they elicited the required information.

*Do you want a single point or double point here?*

*At what height do you want the point?*

1. Provide a comment that shows that the language used and the interaction was conducted in a manner appropriate to the context, medium and relationship between the participants.

*Polite and friendly; said excuse me to interrupt the customer; asked the customer to come and show them exactly where the power points should be.*

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| Telephone Inquiry - Observer recording sheet |
| Assessor/workplace supervisor to describe the inquiry here:  *Learner is an apprentice electrician. They are out on the tools with the boss and were due to be at a customer’s to install an outside light at 8.00am. The customer left a message on the work answerphone overnight asking if it is possible to change the time for the work. The learner called the customer to discuss an alternative time to complete the job.* |

*For each of the categories below, give examples to provide evidence of how the learner made the inquiry:*

1. Provide a comment that shows the learner used a greeting appropriate to the situation and inquiry.

*Said Good Morning, introduced themselves by name and as one of the electricians that was coming round this morning to install the outside light. Checked that this was a good time to discuss an alternative time.*

1. Provide a comment that shows the learner’s needs were stated clearly and concisely, and checked with the recipient.

*Said that they had been asked by the office to call them and try to arrange an alternative time to come and install the outside light – checked with customer that now was a good time to do this.*

1. Give two examples of questions used by the learner to ensure they elicited the required information.

*Is now a good time to talk to you to arrange another time to come and install the outside light?*

*Are you going to be at home later in the day, if we are able to reschedule our other appointments today?*

1. Provide a comment that shows that the language used and the interaction was conducted in a manner appropriate to the context, medium and relationship between the participants.

*Introduced themselves politely, explained who they were and the company there are from; said thank you at the end and would check with today’s other appointments and onfirm they will be there at 3pm.*

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| Face-to-face transaction - Observer recording sheet |
| Assessor/workplace supervisor to describe the practical transaction here:  *Learner is an apprentice with a firm of local electricians – they are out in the van today and I have asked them take a cheque and call in at the local electrical supplies merchant to pay the monthly account.* |

*For each of the categories below, give examples to provide evidence of how the learner completed the practical transactions.*

1. Provide a comment that shows the learner used greetings that fit the situation and inquiry.

*Introduced themselves and said which firm they are from.*

1. Provide a comment that shows the transaction requirements were stated clearly and concisely, and checked with the recipient.

*Said they had been asked to drop off a cheque for the monthly account and checked about who should they talk to.*

1. Give two examples of relevant questions used by the learner to ensure they elicited the required information.

*Who do I talk to about paying the monthly account?*

*Can I have a receipt for the cheque to take back to the office?*

1. Provide a comment that shows that the language used and the interaction was conducted in a manner appropriate to the context, medium and relationship between the participants.

*Polite and friendly; introduced themselves and said which company they are from.*

*Made sure they got a receipt and said thank you at the end.*

1. Provide a comment to show that the language used by the learner during the interaction was clear, concise and spontaneous.

*Learner had initiated the discussion; explained what they needed to do and that a receipt would be* *needed.*

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| Telephone transaction – Observer recording sheet |
| Assessor/workplace supervisor to describe the transaction here:  *Learner is an apprentice. They were with me today to go and price a job and the customer wants an external light I don’t have in stock so I’ve asked the apprentice to call the local suppliers and get one ordered in.* |

*For each of the categories below, give examples to provide evidence of how the learner made the inquiry:*

1. Provide a comment that shows the learner used greetings that fit the situation and inquiry.

*Said hello, introduced themselves by name and the company they were calling on behalf of.*

1. Provide a comment that shows the transaction requirements were stated clearly and concisely, and checked with the recipient.

*Explained that a customer has seen an external light in a magazine, gave the exact make and model and asked for one to be ordered in. Learner asked the supplier to repeat the details back to them.*

1. Give two examples of relevant questions used by the learner to ensure they elicited the required information.

*Have you got this make and model currently in stock?*

*Can you order one in for us?*

*When will it arrive so that we can let the customer know.*

1. Provide a comment that shows that the language used and the interaction was conducted in a manner appropriate to the context, medium and relationship between the participants.

*Friendly and polite.*

1. Provide a comment to show that the language used by the learner during the interaction was clear, concise and spontaneous.

*The learner had initiated the conversation; was specific about the make and model required and checked when the light would be available.*

Soil tester

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| Face-to-face Inquiry - Observer recording sheet |
| Assessor/workplace supervisor to describe the inquiry here  *Learner is a soil tester for a fertiliser company and has turned up to a farm to take some soil samples. However, it has been raining for three days and the tracks are waterlogged so they have to find the farmer and find out an alternative route across the farm to the paddocks they have to test.* |

*For each of the questions below, please give specific examples that provide evidence of how the learner made the inquiry:*

1. Provide a comment that shows the learner used a greeting appropriate to the situation and inquiry.

*Learner approached the farmer, introduced themselves and said they are the person who called from the fertiliser company to arrange to take some soil samples today.*

1. Provide a comment that shows the learner’s needs were stated clearly and concisely, and checked with the recipient.

*Stated which tracks were waterlogged and they are concerned about their vehicle getting bogged in. Checked that Farmer was aware of the condition of the tracks.*

1. Give two examples of questions used by the learner to ensure they elicited the required information.

*Are all the tracks across the farm as waterlogged and bogged as these here at the entrance?*

*Is there another way across to paddocks 13 and 15?*

*Is there someone who has time to take me across on the quad bike?*

1. Provide a comment that shows that the language used and the interaction was conducted in a manner appropriate to the context, medium and relationship between the participants.

*Polite and friendly.*

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| Telephone Inquiry - Observer recording sheet |
| Assessor/workplace supervisor to describe the inquiry here  *Learner is a soil tester for a fertiliser company. When they visit farms they need a map of all the paddocks and also have to check with the farmer exactly which paddocks they want tested. The company has maps for a few farms on record but not all so it is sometimes necessary to get a map from the farmer.* |

*For each of the categories below, give examples to provide evidence of how the learner made the inquiry:*

1. Provide a comment that shows the learner used a greeting appropriate to the situation and inquiry.

*Said hello, Introduced themselves by name and the company they are from.*

1. Provide a comment that shows the learner’s needs were stated clearly and concisely, and checked with the recipient.

*Explained that there is no farm map for the farm on record and needs a copy of a current farm map (and confirmation of which paddocks they want tested. Learner checked that the farmer could provide this.*

1. Give two examples of questions used by the learner to ensure they elicited the required information.

*Do you have a farm map you could leave a copy of in the milking shed.*

*I just want to check which paddocks you want testing – could you mark these on the map?*

1. Provide a comment that shows that the language used and the interaction was conducted in a manner appropriate to the context, medium and relationship between the participants.

*Friendly and polite.*

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| Face-to-face transaction - Observer recording sheet |
| Assessor/workplace supervisor to describe the practical transaction here  *Learner is working as a soil tester for a fertiliser company. When the soil samples have been taken they need to be bagged up and taken to the local courier company to be couriered to the laboratory in Napier for testing.* |

*For each of the categories below, give examples to provide evidence of how the learner completed the practical transactions.*

1. Provide a comment that shows the learner used greetings that fit the situation and inquiry.

*The learner drops bags off at the same company every day so they know each other well – they usually just say “hello, how’s it going” or similar.*

1. Provide a comment that shows the transaction requirements were stated clearly and concisely, and checked with the recipient.

*Learner said they are here to drop off some more soil samples to be sent off to the laboratory. Checked where the bags should be left.*

1. Give two examples of relevant questions used by the learner to ensure they elicited the required information.

*I’ve got a lot of bags today, could you bring round the trolley from the back please?*

*Shall I drop them round the back for you?*

1. Provide a comment that shows that the language used and the interaction was conducted in a manner appropriate to the context, medium and relationship between the participants.

*Cheerful and jokey and friendly – these guys see each other most days.*

1. Provide a comment to show that the language used by the learner during the interaction was clear, concise and spontaneous.

*The learner does not normally need to say anything when the bags are dropped off but in this instance they asked for the trolley and checked if they should drop the bags off round the back.*

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| Telephone transaction – Observer recording sheet |
| Assessor/workplace supervisor to describe the transaction here:  *Learner is just started working for us as a soil tester for a fertiliser company. New staff have to call head office and arrange for their uniform. I’ve given them a checklist of what to ask for – they should get it delivered here rather than to home.* |

*For each of the categories below, give examples to provide evidence of how the learner made the inquiry:*

1. Provide a comment that shows the learner used greetings that fit the situation and inquiry.

*Said hello, Introduced themselves by name and the company they are from.*

1. Provide a comment that shows the transaction requirements were stated clearly and concisely, and checked with the recipient.

*Explained that they are new and they have been asked to call up and order their uniform. Asked if they were speaking to the right person to order the uniform.*

1. Give two examples of relevant questions used by the learner to ensure they elicited the required information.

*What is the chest size on the medium polo shirt as I don’t want one that is too large and sometimes they vary quite a bit?*

*Can it be delivered here at work – the boss has said I should get it delivered here rather than at home.*

1. Provide a comment that shows that the language used and the interaction was conducted in a manner appropriate to the context, medium and relationship between the participants.

*Polite and friendly – specific about which uniform items are required, sizing etc.*

1. Provide a comment to show that the language used by the learner during the interaction was clear, concise and spontaneous.

*Learner had initiated the conversation.*

*Went through the checklist right at the end to make sure the items and sizes had been correctly ordered.*

Aged Care Worker

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| Face-to-face Inquiry - Observer recording sheet |
| Assessor/workplace supervisor to describe the inquiry here:  *Learner is working as a Care Assistant in a Care Home for the elderly and is completing the care plan to capture a new resident’s personal information*. |

*For each of the questions below, please give specific examples that provide evidence of how the learner made the inquiry:*

1. Provide a comment that shows the learner used a greeting appropriate to the situation and inquiry.

*Learner said hello, how are you Mrs Jones, introduced themselves by name and welcomed them to the Care Home and said that they hoped they’d settle in quickly.*

1. Provide a comment that shows the learner’s needs were stated clearly and concisely, and checked with the recipient.

*Explained what the purpose of the care plan is; said they’d be asking a few questions about their family, contact details for the family and medical history. Checked if Mrs Jones understood what would be involved and asked if now was a good time to talk about the care plan.*

1. Give two examples of questions used by the learner to ensure they elicited the required information.

*Have you got any children? What are their names?*

*Have you got any grandchildren?*

*Who is your family doctor?*

*Are you currently taking any medication?*

1. Provide a comment that shows that the language used and the interaction was conducted in a manner appropriate to the context, medium and relationship between the participants.

*The most important thing is sitting with the resident, at their level, to make sure they can hear and see you clearly. The learner sat facing the resident and spoke clearly.*

*The learner used formal introductions – Mrs Jones – rather than first name terms.*

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| Telephone Inquiry - Observer recording sheet |
| Assessor/workplace supervisor to describe the inquiry here  *Learner is working as a Care Assistant in a Care Home for the elderly. They have been asked to telephone the hairdresser and arrange an appointment for a resident for the following Tuesday.* |

*For each of the categories below, give examples to provide evidence of how the learner made the inquiry:*

1. Provide a comment that shows the learner used a greeting appropriate to the situation and inquiry.

*Said hello, introduced themselves.*

1. Provide a comment that shows the learner’s needs were stated clearly and concisely, and checked with the recipient.

*Explained they were calling from the Care Home to make an appointment for a Resident for the following Tuesday. Learner checked that they were speaking to the right person to make an appointment and asked if now was a good time to make the appointment.*

1. Give two examples of questions used by the learner to ensure they elicited the required information.

*Asked if the resident’s preferred stylist was still working there.*

*Asked if there any available appointments next Tuesday?*

1. Provide a comment that shows that the language used and the interaction was conducted in a manner appropriate to the context, medium and relationship between the participants.

*Polite, clear, introductions established calling on behalf of someone else.*

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| Face-to-face transaction - Observer recording sheet |
| Assessor/workplace supervisor to describe the practical transaction here  *Learner works in an Aged Care Home and went to the Office Manager to make a booking for the van to take a resident to hospital for an appointment.* |

*For each of the categories below, give examples to provide evidence of how the learner completed the practical transactions.*

1. Provide a comment that shows the learner used greetings that fit the situation and inquiry.

*Assistant and Office Manager know each other by name. Greetings were informal.*

1. Provide a comment that shows the transaction requirements were stated clearly and concisely, and checked with the recipient.

*Said they had come to make a van booking, and asked if now was a good time to make that booking.*

1. Give two examples of relevant questions used by the learner to ensure they elicited the required information.

*Asked for the van booking sheet.*

*Checked that the van driver would be available for the time of the appointment and van booking.*

1. Provide a comment that shows that the language used and the interaction was conducted in a manner appropriate to the context, medium and relationship between the participants.

*Participants know each other so the interaction was friendly and informal with some other discussion about how their day was going, what their children are up to etc.*

1. Provide a comment to show that the language used by the learner during the interaction was clear, concise and spontaneous.

*Learner initiated the discussion; conversation was informal but polite; booking was completed.*

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| Telephone transaction – Observer recording sheet |
| Assessor/workplace supervisor to describe the transaction here  *Learner has been working a care home and has been asked to contact the local garage and arrange for the van to be dropped off for a service.* |

*For each of the categories below, give examples to provide evidence of how the learner made the inquiry:*

1. Provide a comment that shows the learner used greetings that fit the situation and inquiry.

*Said hello, introduced themselves and where they were calling from.*

1. Provide a comment that shows the transaction requirements were stated clearly and concisely, and checked with the recipient.

*Stated that they were calling on behalf of the Operations Manager at the Care Home to arrange for the van to be dropped off for a service. Checked that the service will take a full day and asked approximate cost.*

1. Give two examples of relevant questions used by the learner to ensure they elicited the required information.

*Asked the latest time the van could be dropped off on Wednesday morning.*

*Asked the earliest time the service would be finished by.*

1. Provide a comment that shows that the language used and the interaction was conducted in a manner appropriate to the context, medium and relationship between the participants.

*Learner was polite but friendly.*

1. Provide a comment to show that the language used by the learner during the interaction was clear, concise and spontaneous.

*Learner had made the phone call so initiated the request – booking was confirmed for Wednesday.*