

|              |  |                |          |
|--------------|--|----------------|----------|
| <b>Title</b> | <b>Prepare for and handle payment transactions in a service delivery context</b> |                |          |
| <b>Level</b> | <b>3</b>   | <b>Credits</b> | <b>4</b> |

|                |  |
|----------------|--|
| <b>Purpose</b> | <p>This unit standard is for people who handle payment transactions or prepare accounts for payment in the service sector.</p> <p>People credited with this unit standard are able to prepare for and handle payment transactions in a service delivery context.</p> |
|----------------|--|

|                       |  |
|-----------------------|--|
| <b>Classification</b> | Service Sector Skills > Service Delivery |
|-----------------------|--|

|                        |          |
|------------------------|----------|
| <b>Available grade</b> | Achieved |
|------------------------|----------|

### Guidance Information

#### 1 Definitions

*Float* refers to cash prepared and retained in the cash drawer to maintain a sufficient amount of change for sale transactions.

*Point of sale* refers to place and equipment where customer payments are received.

*Workplace requirements* refer to documented policies and procedures or established protocols for workplace performance and may include but are not limited to – any legal requirements, standards, codes of practice, company and/or site procedures, and any industry best-practice documents.

#### 2 Legislation to be complied with may include but is not limited to:

Consumer Guarantees Act 1993

Fair Trading Act 1986

Health and Safety at Work Act 2015

Human Rights Act 1993

Privacy Act 2020.

#### 3 For assessment purposes evidence is required that customers are greeted and treated in a polite, friendly and helpful manner.

#### 4 Evidence for assessment of the practical components of this unit standard must be gathered in the workplace or in a realistic environment where the candidate has to produce a product or similar for customers who have the same expectations for quality and timeliness as a paying customer.

#### 5 All assessment tasks are to be carried out in accordance with workplace requirements.

---

## Outcomes and performance criteria

### Outcome 1

Prepare for payment transactions in a service delivery context.

#### Performance criteria

1.1 Point of sale is opened.

Range opening may include but is not limited to – time, access, password, security, float is checked.

1.2 Documentation related to payment transactions is completed.

1.3 Equipment and materials required for a payment point are kept available and ready for use.

Range equipment and materials may include but are not limited to – cash equivalents, cash, stationery, EFTPOS, scanners (fixed, handheld), keypad operated registers, credit card processing equipment.

### Outcome 2

Handle payment transactions in a service delivery context.

#### Performance criteria

2.1 Customer payments are accepted at point of sale.

Range acceptance may include but is not limited to – price is entered, price is confirmed with customer, payment method is determined.

2.2 Payment transactions are completed with correct payment received for product or service supplied to customer.

Range payments may include but are not limited to – credit card, EFTPOS, vouchers, foreign currency, cash.

2.3 Discrepancies in payment transactions are identified and recorded.

2.4 Payment point contents are made available for authorised collection during service, if required.

2.5 Refunds and credits are processed, if required.

2.6 Contingency plans are followed in the event of power or equipment failures.

2.8 Point of sale is closed.

Range closure may include but is not limited to – time, access, password, security.

|                                |  |
|--------------------------------|--|
| <b>Replacement information</b> | This unit standard replaced unit standard 14463. |
|--------------------------------|--|

|                            |                  |
|----------------------------|------------------|
| <b>Planned review date</b> | 31 December 2025 |
|----------------------------|------------------|

#### Status information and last date for assessment for superseded versions

| Process      | Version | Date              | Last Date for Assessment |
|--------------|---------|-------------------|--------------------------|
| Registration | 1       | 20 February 2014  | 31 December 2023         |
| Review       | 2       | 28 October 2021   | N/A                      |
| Revision     | 3       | 26 September 2024 | N/A                      |

|  |      |
|--|------|
| <b>Consent and Moderation Requirements (CMR) reference</b> | 0112 |
|--|------|

This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

#### Comments on this unit standard

Please contact Ringa Hora Services Workforce Development Council [qualifications@ringahora.nz](mailto:qualifications@ringahora.nz) if you wish to suggest changes to the content of this unit standard.