

# LANNAC7 - SQA Unit Code F8HJ 04

## Carry out reception duties



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### Overview

This standard covers the important skills of welcoming and receiving people, handling enquiries, making appointments and dealing with client payments for products/services. Dealing with members of the public in a polite manner, whilst questioning them to find out what they require, forms an important part of this unit.

The elements are:

1. Attend to clients and enquiries
2. Make appointments
3. Handle payments from clients

Element 1 is about dealing with customer enquiries efficiently, effectively and confidentially whilst communicating with others and following correct procedures.

Element 2 covers how to make appointments efficiently, accurately and courteously for clients. It includes communication skills and record keeping.

Element 3 is about taking payments from clients, following the correct processing procedures, checking payment methods and identifying discrepancies. It includes how to deal with invalid payment methods and payment disputes, record keeping and effective communication.

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### Performance criteria

*You must be able to:*

#### **Attend to clients and enquiries**

- P1 treat all people making **enquiries** in a polite manner
- P2 identify the purpose of the enquiry correctly
- P3 confirm appointments and inform the relevant member of staff promptly
- P4 refer **enquiries** which cannot be dealt with promptly to the relevant person for action
- P5 record messages accurately and pass them to the relevant person at the right time
- P6 give clear and accurate information
- P7 provide confidential information to people who are authorised to receive it

*You must be able to:*

#### **Make appointments**

- P8 deal with all requests for **appointments** politely and promptly
- P9 accurately identify client requirements
- P10 schedule **appointments** to satisfy the client and to ensure the most productive use of time
- P11 confirm the availability of services, where necessary, with relevant colleagues
- P12 confirm **appointment details** are acceptable to the client
- P13 ensure all **appointment details** are accurate, recorded in the right place and are easy to read

*You must be able to:*

#### **Handle payments from clients**

- P14 give details of the total costs to the client accurately
- P15 communicate with the client in a courteous manner
- P16 establish the client's **method of payment** and acknowledge receipt of payment
- P17 check payments are correct
- P18 complete relevant documents accurately
- P19 identify and report **discrepancies** which cannot be resolved promptly to the relevant person
- P20 give the correct change and issue receipts as required
- P21 follow cashpoint security procedures at all times
- P22 identify low levels of change and report in time to avoid shortages

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### Knowledge and understanding

*You need to know and understand:*

#### **Attend to clients and enquiries**

- K1 the importance of taking messages and passing them on to the right person
- K2 the importance of confidentiality and what may happen if it is broken
- K3 written, verbal, non-verbal communication
- K4 how to communicate effectively and why it is important
- K5 limits of your own authority when attending to people and enquiries
- K6 who to refer to with different types of enquiries
- K7 procedures for taking messages
- K8 the procedures for handling confidential information

*You need to know and understand:*

#### **Make appointments**

- K9 the importance of making appointments correctly
- K10 the importance of communicating effectively
- K11 how to make appointments
- K12 how to ask the right questions and give suitable answers to questions
- K13 the services available; their duration and cost
- K14 how the appointment system works
- K15 the limits of your own authority when making appointments.

*You need to know and understand:*

#### **Handle payments from clients**

- K16 what may happen if you fail to follow payment procedures
- K17 what may happen if you fail to handle payments correctly
- K18 why it is important to communicate effectively with clients
- K19 how to communicate effectively
- K20 prices of services and products
- K21 forms of payment which are acceptable within the organisation
- K22 procedures for processing payments
- K23 what constitutes an invalid payment
- K24 procedures to be followed when fraudulent payment is suspected
- K25 the limits of your own authority for dealing with discrepancies

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### Additional Information

#### Scope/range related to performance criteria

##### Attend to clients and enquiries

1. attend to the following **enquiries**:
  - 1.1. face-to-face enquiries
  - 1.2. telephone enquiries

##### Make appointments

2. make **appointments** in the following ways:
  - 2.1. face to face
  - 2.2. by telephone
3. take the following **appointment details**:
  - 3.1. client's name
  - 3.2. service required
  - 3.3. price range
  - 3.4. date and time
  - 3.5. member of staff booked for service

##### Handle payments from clients

4. deal with the following **methods of payment**:
  - 4.1. cash and cash equivalents
  - 4.2. cheque
  - 4.3. payment cards
5. deal with the following **discrepancies**:
  - 5.1. invalid currency
  - 5.2. invalid card
  - 5.3. suspected fraudulent use of payment card
  - 5.4. payment disputes

## **LANNAC7** - SQA Unit Code F8HJ 04

### Carry out reception duties

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**Originating organisation** LANTRA

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**Original URN** NAC7

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**Relevant occupations** Agriculture, Horticulture and Animal Care; Animal care and veterinary science; Administration; Secretarial and Related Occupations

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**Suite** Animal Care V2

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**Key words** appointments, communication, record, payments, disputes

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