

Unit PPL2FOH4 (HL3A 04) Prepare Customer Accounts and Deal with Departures

I confirm that the evidence detailed in this unit is my own work.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Candidate’s name** |  | **Candidate’s signature** |  | **Date** |
|  |  |  |

I confirm that the candidate has achieved all the requirements of this unit.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Assessor’s name** |  | **Assessor’s signature** |  | **Date** |
|  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Countersigning — Assessor’s name**  **(if applicable)** |  | **Countersigning — Assessor’s signature**  **(if applicable)** |  | **Date** |
|  |  |  |

I confirm that the candidate’s sampled work meets the standards specified for this unit and may be presented for external verification.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Internal verifier’s name** |  | **Internal verifier’s signature** |  | **Date** |
|  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Countersigning — Internal verifier’s name**  **(if applicable)** |  | **Countersigning — Internal verifier’s signature**  **(if applicable)** |  | **Date** |
|  |  |  |

|  |  |
| --- | --- |
| **External Verifier’s initials and date (if sampled)** |  |

Unit PPL2FOH4 (HL3A 04) Prepare Customer Accounts and Deal with Departures

|  |
| --- |
| **Unit overview** |
| This unit is about maintaining customer accounts by entering charges and adjustments onto the account. It also covers dealing with departing customers by completing the relevant documentation and procedures, and recording customer comments.  This unit is for members of staff that have responsibility for checking out customers. |

|  |
| --- |
| **Sufficiency of evidence** |
| There must be sufficient evidence to ensure that the candidate can consistently achieve the required standard over a period of time in the workplace or approved realistic working environment. |

This page is intentionally blank

Unit PPL2FOH4 (HL3A 04) Prepare Customer Accounts and Deal with Departures

|  |  |
| --- | --- |
| **Performance criteria** | |
| **What you must do:** | |
| There must be evidence for all Performance Criteria (PC). The assessor **must** assess PCs 1-5 and 13-15 by directly observing the candidate’s work. PCs 11 and 12 may be assessed by alternative methods if observation is not possible. | |
| **Prepare and maintain customer accounts**  **1 Enter charges regularly and accurately against customer accounts in the account system.**  **2 Record any account adjustments accurately against customer accounts.**  **3 File and store account documents correctly at all times.**  **4 Complete customer accounts for the customer.**  **5 Follow organisational confidentiality procedures when dealing customers' accounts.**  **Deal with the departure of customers**  6 Greet and deal with customers in a polite, welcoming and efficient way.  7 Prepare documents and other necessary items before the customer departs. | 8 Present the account to the customer for confirmation.  9 Check customer account details and request payment as required.  10 Complete documentation and deal with it using the correct account or booking system.  11 Complete all other organisational procedures for customer departures.  12 Record customer comments, complaints and suggestions and feed them back to the appropriate person or department.  **13 Promote establishment services and facilities as appropriate.**  **14 Offer to deal with and organise any future booking requirements.**  **15 Wish the customer a pleasant onward journey in a way that projects a positive and polite image once all the departure procedures have been completed.** |

|  |  |  |  |
| --- | --- | --- | --- |
| **Scope/Range** | | | |
| **What you must cover:** | | | |
| **All** scope/range must be covered. There must be performance evidence, gathered through direct observation by the assessor of the candidate’s work for: | | | |
| **one** from:  (a) computerised systems  (b) manual systems  (c) on-line systems | **two** from:  (d) charges  (e) allowances or discounts  (f) refunds  (g) deposits or pre-payments  (h) transfers | **two** from:  (i) customer accounts where part payment is required  (j) customer accounts where full payment is required  (k) customer accounts that do not require immediate settlement | Evidence for the remaining points under ‘what you must cover’ may be assessed through questioning or witness testimony. |

Unit PPL2FOH4 (HL3A 04) Prepare Customer Accounts and Deal with Departures

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Evidence reference** | **Evidence description** | **Date** | **Performance criteria** | | | | | | | | | | | | | | | | | | | | | | | | |
| **What you must do** | | | | | | | | | | | | | | | | | | | | | | | | |
| **1** | **2** | | **3** | | **4** | | **5** | **6** | | **7** | | **8** | **9** | | **10** | | **11** | | **12** | **13** | | **14** | | **15** |
|  |  |  |  |  | |  | |  | |  |  | |  | |  |  | |  | |  | |  |  | |  | |  |
|  |  |  |  |  | |  | |  | |  |  | |  | |  |  | |  | |  | |  |  | |  | |  |
|  |  |  |  |  | |  | |  | |  |  | |  | |  |  | |  | |  | |  |  | |  | |  |
|  |  |  |  |  | |  | |  | |  |  | |  | |  |  | |  | |  | |  |  | |  | |  |
| **Evidence reference** | **Evidence description** | **Date** | **Scope/Range** | | | | | | | | | | | | | | | | | | | | | | | | |
| **What you must cover** | | | | | | | | | | | | | | | | | | | | | | | | |
| **a** | | **b** | | **c** | | **d** | | | **e** | | **f** | | | **g** | | **h** | | **i** | | | **j** | | **k** | |
|  |  |  |  | |  | |  | |  | | |  | |  | | |  | |  | |  | | |  | |  | |
|  |  |  |  | |  | |  | |  | | |  | |  | | |  | |  | |  | | |  | |  | |
|  |  |  |  | |  | |  | |  | | |  | |  | | |  | |  | |  | | |  | |  | |
|  |  |  |  | |  | |  | |  | | |  | |  | | |  | |  | |  | | |  | |  | |

Unit PPL2FOH4 (HL3A 04) Prepare Customer Accounts and Deal with Departures

|  |  |  |
| --- | --- | --- |
| **Knowledge and understanding** | | **Evidence reference**  **and date** |
| **What you must know and understand** | |
| For those knowledge statements that relate to **how** the candidate should do something, the assessor may be able to infer that the candidate has the necessary knowledge from observing their performance or checking products of their work. In **all** other cases, evidence of the candidate’s knowledge and understanding must be gathered by alternative methods of assessment (eg oral or written questioning). | |
|  | **For the whole unit** |  |
| 1 | Your organisation's standards for customer care, and why it is important to follow these |  |
| 2 | Basic legal requirements relating to preparing and maintaining customer accounts |  |
| 3 | Your organisation's procedures for customer accounts, and why it is important to follow these |  |
|  | **Prepare and maintain customer accounts** |  |
| 4 | Why customer accounts must be updated regularly with charges and adjustments |  |
| 5 | Why it is important to give accurate verbal and written information to customers |  |
| 6 | Why customer accounts must be secured from unauthorised access |  |
| 7 | The types of unexpected situations and problems that may occur with customer accounts, and how to deal with these correctly |  |
|  | **Deal with the departure of customers** |  |
| 8 | Basic legal requirements relating to accommodation, goods and services for sale |  |
| 9 | Safe and hygienic working practices when dealing with the departure of customers |  |
| 10 | Your organisation's procedures for customer departures |  |
| 11 | Why complaints, comments and suggestions should be recorded and fed back to the appropriate person / department |  |
| 12 | Why details of any extra charges should be available to the customer |  |
| 13 | The types of unexpected situations and problems that may occur with customer departures and how to deal with these correctly |  |
| 14 | Opportunities to promote the organisation when the customer is leaving |  |

Unit PPL2FOH4 (HL3A 04) Prepare Customer Accounts and Deal with Departures

# Supplementary evidence

|  |  |  |
| --- | --- | --- |
| **Evidence** | | **Date** |
| 1 |  |  |
| 2 |  |  |
| 3 |  |  |
| 4 |  |  |
| 5 |  |  |
| 6 |  |  |

|  |
| --- |
| **Assessor feedback on completion of the unit** |
|  |