



Student Assessment Book  
FNSCRD302 Monitor and control accounts  
receivable- (Release 1)



Claydon Brothers

## Document Control

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## Introduction

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Welcome to the unit of competency FNSCR302 Monitor and control accounts receivable. This is a 20-hour unit which means it should take you about this time on average to fully complete the unit. This is dependent however on the time you allocate to it, your other studies and work-life balance.

This unit equips individuals with the necessary skills and knowledge to effectively manage accounts receivable. Learners will gain expertise in:

Identifying and analysing account deficits: This includes understanding the reasons behind outstanding debts and their potential impact on the organisation.

Selecting appropriate payment methods: Learners will develop the ability to recommend suitable payment options based on individual customer circumstances and organisational policies.

Monitoring and controlling accounts: This involves implementing strategies to ensure timely payments, minimize bad debts, and maintain healthy cash flow.

## Target Audience:

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This unit is designed for individuals working in entry-level positions related to credit management and customer service, who have responsibility for basic accounts receivable functions.

## Learning Outcomes:

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Upon successful completion of this unit, learners will be able to:

- Collect and record monies due.
- Review compliance with terms and conditions.
- Resolve disputed amounts within predetermined parameters.

To meet these outcomes you will be asked to:

- Assess the nature and extent of account deficits: This includes analysing financial data, investigating the reasons for outstanding payments, and identifying potential risks.
- Determine appropriate payment methods: Learners will consider factors such as customer creditworthiness, account history, and organisational policies when recommending payment options.
- Implement strategies to monitor and control accounts: This involves tasks such as generating reports, sending reminders, and following up on overdue payments.
- Communicate effectively with customers: Learners will develop skills to explain account balances, discuss payment options, and maintain positive customer relationships.
- Apply relevant legislative and regulatory requirements: This includes understanding and adhering to relevant laws and regulations governing credit management practices.

## **Pre-requisite Unit**

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Nil.

## **Regulatory and Legislative Requirements**

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Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to this learning guide for more information about regulatory and legislative requirements or the relevant regulator for guidance on their specific requirements.

## Assessments Overview

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This Assessment Booklet includes all your tasks for the assessment in this unit of competency and you must complete all assessment tasks.

<b>Assessment Task</b>	<b>About this Assessment</b>
Assessment Task 1: Knowledge Assignment	You must correctly answer all questions to show that you understand the knowledge required for this unit.
Assessment Task 2: Status of Debt and collecting and monitoring monies due.	You will read the case study and answer a number of questions about the case study presented as well as produce documents. The case studies will be simulated activities where you will be required to analyse accounts, recommend payment options, and communicate effectively with customers in simulated scenarios.
Assessment Task 3: Maintain Customer Contact Records	You will read the case study and answer a number of questions about the case study presented as well as produce documents. The case studies will be simulated activities where you will be required to analyse accounts, recommend payment options, and communicate effectively with customers in simulated scenarios.
Assessment Task 4: Identifying breaches and contacting customers.	You will read the case study and answer a number of questions about the case study presented as well as produce documents. The case studies will be simulated activities where you will be required to analyse accounts, recommend payment options, and communicate effectively with customers in simulated scenarios.
Assessment Task 5: Resolving Disputed amounts.	You will read the case study and answer a number of questions about the case study presented as well as produce documents. The case studies will be simulated activities where you will be required to analyse accounts, recommend payment options, and communicate effectively with customers in simulated scenarios.

## **How to submit your Assessments**

When you have completed each assessment task, submit all evidence listed to your Assessor either in hardcopy, electronically by email or uploading to the RTO's Assessment Portal or as otherwise instructed by your Assessor.

Make sure you keep a copy of all submitted work as your Assessor will not return these to you. It is your responsibility to keep this copy until you have completed the course.

## **Assessment Cover Sheet**

Each Assessment Task has a cover sheet that you need to complete and sign the declaration. Submit this with your evidence for each Assessment Task. Ensure you answer all questions and complete all details prior to submitting this form.

## **Feedback from your Assessor**

Your Assessor will provide feedback on the Record of Outcome for each Assessment Task. This form will be provided to you and you must return this form to the Assessor for storage. Sign and Date this form. Provide any comments that you wish your Assessor to know.

## **Resubmission of any Assessment Task**

If you get something wrong and have to resubmit a part of your evidence or re-do a task again, the Assessor will discuss this with you and provide a deadline for you to resubmit the evidence by.

## **Deadlines for submission of evidence**

Your Assessor will notify you of the last possible date of submission of evidence. There are no extensions provided unless there are extenuating circumstances. You would need to apply for an extension with your Assessor stating the grounds for the request. Do not assume an extension will be approved. It rarely is.

## **Purpose of the Assessments**

All assessments have been created for you to be able to demonstrate your competency levels in each area. When you are graded Satisfactory in each Assessment Task, this leads to a competent result in the entire unit.

## **Assessment decisions**

Your Assessor will mark each assessment task against the performance and knowledge criteria in the unit. Each aspect of the criteria being tested is listed in the section of the assessment ***"You will be required to have a good understanding of the following areas"***.

## Assessment Cover Sheet

Student Name		USI	
Unit of Competency	FNSCRD302 Monitor and control accounts receivable - Release 1		
Assessors Name			
Assessment Task 1	Knowledge Assignment		
Submission Date			
Answer the following questions prior to commencing the Assessment Task		Yes	No
Are you ready to be assessed? I understand the assessment instructions and requirements and consent to being assessed. (i.e. you have completed all training and feel confident to undertake the assessment. You know the purpose of the assessment and what resources I can use).			
Do you understand your rights in the assessment process?			
Do you understand the appeal system if you are not happy with your outcomes?			
Do you have any special needs or support to be considered during assessment? (If Yes, advise your Assessor of what support you will need).			
Do you understand that you can apply for Recognition of Prior Learning (RPL) instead of completing the assessment? (i.e. the reason would be that you already have attained this unit or have the knowledge and skills to be assessed immediately without training).			
Do you know what evidence you must submit for this assessment?			
Do you understand the assessment process as explained by your Assessor?			
<b>Student's declaration</b>			
<ul style="list-style-type: none"> <li>• I declare that the evidence I have supplied is my own work.</li> <li>• None of this work has been completed by any other person.</li> <li>• I have not cheated or plagiarised the work or colluded with any other student/s.</li> <li>• I have correctly referenced all resources, reference texts throughout this assessment task.</li> <li>• I understand that if am in breach of this policy that disciplinary action may be taken against me.</li> </ul>			
Student's Signature		Date	



## Assessment Task 1: Record of Outcome

Assessment Task #	Name of Assessment Task	Satisfactory	Not Yet Satisfactory
Assessment Task 1	Knowledge Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Assessor Statement	I certify that the student being assessed has the skills, knowledge and abilities as described in the unit of competency and associated assessment requirements. The quality, quantity, currency, and relevance of the assessment evidence enabled me to make a judgement of competency for this student. I have uploaded this student's evidence for the RTO to certify and forwarded results to the Administration for entry into RTO Student Management System on the Record of Outcome Form at the end of the Student Assessment Book.		
Feedback to Student			
I acknowledge the feedback provided by my Assessor. Provide any comments below that you wish your Assessor to know.			
Student's signature		Date	
Assessor's name Please print			
Assessor's Signature		Date	

## **Assessment Task 1: Knowledge Assignment**

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### **Overview of Task**

You are to answer all the questions in this task by selecting the most correct response. You must also include a rationale for your choice for each question. There are 18 multiple choice questions and you must get all questions correct with a rationale for each to gain a satisfactory grade in this assessment.

### **What resources do I need to complete this task?**

- Access to learning materials
- Access to a computer and the Internet
- Access to Policies and Procedures
- Access to the Resources Folder for documents from the Internet and Templates

### **Instructions to Students:**

- This is an open book test which means you can use your learning materials as a reference.
- You need to answer all questions.
- You must answer the questions by circling the correct response in each question.
- Your Assessor will advise you if you can email your evidence or if you have to print it out and submit hard copies.
- Submit your evidence on time.
- Your evidence must be authentic (original, references, not plagiarised).

### **You will be required to have a good understanding of the following areas:**

- Organisational credit management protocols and processes.
- Organisational policy on handling complaints and dispute resolution.
- Compliance requirements of the credit management sector.
- Relevant legislation.
- Organisational credit policy and guidelines.
- Clarifying information for basic credit accounts.
- Resolving disputes that comply with legislative requirements and organisational guidelines.
- Using data entry and recording systems to maintain and monitor customer accounts and records.
- Collecting and recording monies due.
- Determining status of a debt.
- Maintaining customer contact records accurately.

- Review compliance with terms and conditions.
- Identifying customers in breach of terms and conditions.
- Contacting customers promptly and courteously.
- Researching background of dispute.
- Types of disputes.

### **Grading**

You must get all questions 100% correct and any supporting documentation requested is submitted to gain a satisfactory in this task.

### **Location**

The assessment will take place in the classroom, a Computing Lab or as otherwise instructed by the Assessor.

**Respond to all questions by circling the correct answer.**

Q1

**Organisational policy on handling complaints and dispute resolution.**

A customer claims they never received a product they ordered and paid for. Your organisation's policy emphasises resolving customer complaints fairly and efficiently. What should be your FIRST course of action?

- (A) Immediately refund the customer's payment.
- (B) Conduct a thorough investigation to verify the customer's claim.
- (C) Offer the customer a replacement product without further investigation.
- (D) Inform the customer their claim needs to be submitted through a specific online form.

Q2

**Compliance requirements of the credit management sector**

Which of the following is NOT a common compliance requirement for credit management professionals?

- (A) Adhering to data privacy laws when collecting and storing customer information.
- (B) Implementing procedures to prevent money laundering and terrorist financing.
- (C) Following ethical debt collection practices to avoid harassing or misleading customers.
- (D) Paying all outstanding debts within a specific timeframe, regardless of customer circumstances.

**Respond to all questions by circling the correct answer.**

Q7

Topic: Legislation Related to Debt Control

Which legislation is primarily concerned with regulating the collection and management of consumer debts?

- A) Tax Code Act
- B) Consumer Credit Protection Act
- C) Environmental Protection Act
- D) Fair Work Act

Q8

Topic: How to Comply with Appropriate Legislation

What is a critical step in ensuring compliance with debt control legislation?

- A) Ignoring legal requirements
- B) Regularly updating policies and procedures
- C) Concealing financial information from customers
- D) Setting arbitrary credit limits for all customers

## Evidence to submit.

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Evidence Submitted to Assessor - Tick if submitted (✓)		Submitted
Attach this checklist to your Assessment Cover Sheet and evidence		
1	Answers to Questions 1-18 in this task	<input type="checkbox"/>
2	Assessment Cover Sheet and Evidence List	<input type="checkbox"/>

## Assessment Cover Sheet

Student Name		USI	
Unit of Competency	FNSCRD302 Monitor and control accounts receivable - Release 1		
Assessors Name			
Assessment Task 2	Case Study - Status of Debt and collecting and monitoring monies due		
Submission Date			
Answer the following questions prior to commencing the Assessment Task	Yes	No	
Are you ready to be assessed? I understand the assessment instructions and requirements and consent to being assessed.  (i.e. you have completed all training and feel confident to undertake the assessment. You know the purpose of the assessment and what resources I can use).			
Do you understand your rights in the assessment process?			
Do you understand the appeal system if you are not happy with your outcomes?			
Do you have any special needs or support to be considered during assessment? (If Yes, advise your Assessor of what support you will need).			
Do you understand that you can apply for Recognition of Prior Learning (RPL) instead of completing the assessment?  (i.e. the reason would be that you already have attained this unit or have the knowledge and skills to be assessed immediately without training).			
Do you know what evidence you must submit for this assessment?			
Do you understand the assessment process as explained by your Assessor?			
<b>Student's declaration</b>			
<ul style="list-style-type: none"> <li>• I declare that the evidence I have supplied is my own work.</li> <li>• None of this work has been completed by any other person.</li> <li>• I have not cheated or plagiarised the work or colluded with any other student/s.</li> <li>• I have correctly referenced all resources, reference texts throughout this assessment task.</li> <li>• I understand that if am in breach of this policy that disciplinary action may be taken against me.</li> </ul>			
Student's Signature		Date	

## Assessment Task 2: Record of Outcome

Assessment Task #	Name of Assessment Task	Satisfactory	Not Yet Satisfactory
Assessment Task 2	Case Study - Status of Debt and collecting and monitoring monies due	<input type="checkbox"/>	<input type="checkbox"/>
Assessor Statement	I certify that the student being assessed has the skills, knowledge and abilities as described in the unit of competency and associated assessment requirements. The quality, quantity, currency, and relevance of the assessment evidence enabled me to make a judgement of competency for this student. I have uploaded this student's evidence for the RTO to certify and forwarded results to the Administration for entry into RTO Student Management System on the Record of Outcome Form at the end of the Student Assessment Book.		
Feedback to Student			
I acknowledge the feedback provided by my Assessor. Provide any comments below that you wish your Assessor to know.			
Student's signature		Date	
Assessor's name Please print			
Assessor's Signature		Date	



## **Assignment Task 2: Case Study - Status of Debt and collecting and monitoring monies due.**

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### **Overview of Task**

You are to demonstrate your skills and abilities in determining the status of debt and record and monitor transactions on account.

### **What resources do I need to complete this task?**

- Access to the Learning Guide
- Access to a computer and the Internet
- Access to word processing software
- Access to Simulated Accounts Receivable Policy and Procedures
- Access to the Resources Folder for documents and additional learning materials

### **Instructions to Students:**

- You must demonstrate your understanding of the issues and procedures related to this task.
- You must demonstrate your practical skills to be able to determine the status of debt and record and monitor transactions on account.
- Your work for this project will also be observed over the semester by your Assessor.
- Your Assessor will advise you if you can email your evidence or if you have to print it out and submit hard copies.
- Submit your evidence on time.
- Your evidence must be authentic (original, references, not plagiarised).

### **You will be required to have a good understanding of the following areas:**

- Collect and record monies due.
- Determine status of debt in accordance with organisational policy and guidelines, and legislative requirements.
- Record and monitor transactions on account accurately according to organisational policy and guidelines.

### **Grading**

All supporting documentation requested must be submitted; and demonstrations to the Assessor must meet the criteria specified and to industry standards to gain a satisfactory in this task.

### **Location**

The assessment will take place in the classroom, a Computing Lab, in the field, in a workshop or as otherwise instructed by the Assessor.

**Respond to the questions**

Q1. What is the primary purpose of determining the status of debt in accordance with organisational policy and legislative requirements?

- A) To increase credit limits for all customers
- B) To ensure compliance with ethical standards
- C) To assess the creditworthiness of debtors
- D) To ignore overdue payments

Q2. According to organisational policy, why is it essential to record and monitor transactions on account accurately?

- A) To intentionally create discrepancies
- B) To facilitate informed decision-making
- C) To discourage customers from making payments
- D) To avoid any record-keeping responsibilities

Q3 What is the purpose of maintaining customer contact records accurately?

- A) To avoid customer interaction
- B) To limit communication channels
- C) To facilitate effective communication
- D) To discourage customers from inquiries

**Practical Journal Entry Questions:**

Q6 Record the journal entry for the sale of electronic goods to XYZ Electronics on credit, amounting to \$5,000.

Date	Account	Folio	Debit (\$)	Credit (\$)

Q7 Journal the entry for the cash payment received from Smart Solutions Ltd., settling their outstanding debt of \$3,000.

Date	Account	Folio	Debit (\$)	Credit (\$)

Q8 Create a journal entry for the allowance for doubtful accounts based on an estimate of 2% of accounts receivable of Reliable Retailers Inc., with a balance of \$8,000.

Date	Account	Folio	Debit (\$)	Credit (\$)

Q9 Record the journal entry for the reversal of a previously written-off account of Tech Innovations Co., now making a partial payment of \$500.

Date	Account	Folio	Debit (\$)	Credit (\$)

## Evidence to submit.

---

Evidence Submitted to Assessor - Tick if submitted (✓)		Submitted
Attach this checklist to your Assessment Cover Sheet and evidence		
1	Responses to 5 multiple choice questions	<input type="checkbox"/>
2	Responses to 5 practical tasks	<input type="checkbox"/>
3	One Accounts Receivable Control Card.	<input type="checkbox"/>
4	Assessment Cover Sheet and Evidence List	<input type="checkbox"/>

## Assessment Cover Sheet

Student Name		USI	
Unit of Competency	FNSCRD302 Monitor and control accounts receivable - Release 1		
Assessors Name			
Assessment Task 3	Maintain Customer Contact Records		
Submission Date			
Answer the following questions prior to commencing the Assessment Task		Yes	No
Are you ready to be assessed? I understand the assessment instructions and requirements and consent to being assessed. (i.e. you have completed all training and feel confident to undertake the assessment. You know the purpose of the assessment and what resources I can use).			
Do you understand your rights in the assessment process?			
Do you understand the appeal system if you are not happy with your outcomes?			
Do you have any special needs or support to be considered during assessment? (If Yes, advise your Assessor of what support you will need).			
Do you understand that you can apply for Recognition of Prior Learning (RPL) instead of completing the assessment? (i.e. the reason would be that you already have attained this unit or have the knowledge and skills to be assessed immediately without training).			
Do you know what evidence you must submit for this assessment?			
Do you understand the assessment process as explained by your Assessor?			
<b>Student's declaration</b>			
<ul style="list-style-type: none"> <li>• I declare that the evidence I have supplied is my own work.</li> <li>• None of this work has been completed by any other person.</li> <li>• I have not cheated or plagiarised the work or colluded with any other student/s.</li> <li>• I have correctly referenced all resources, reference texts throughout this assessment task.</li> <li>• I understand that if am in breach of this policy that disciplinary action may be taken against me.</li> </ul>			
Student's Signature		Date	

## Assessment Task 3: Record of Outcome

Assessment Task #	Name of Assessment Task	Satisfactory	Not Yet Satisfactory
Assessment Task 3	Maintain Customer Contact Records	<input type="checkbox"/>	<input type="checkbox"/>
Assessor Statement	<p>I certify that the student being assessed has the skills, knowledge and abilities as described in the unit of competency and associated assessment requirements. The quality, quantity, currency, and relevance of the assessment evidence enabled me to make a judgement of competency for this student. I have uploaded this student's evidence for the RTO to certify and forwarded results to the Administration for entry into RTO Student Management System on the Record of Outcome Form at the end of the Student Assessment Book.</p>		
Feedback to Student			
<p>I acknowledge the feedback provided by my Assessor. Provide any comments below that you wish your Assessor to know.</p>			
Student's signature		Date	
Assessor's name Please print			
Assessor's Signature		Date	

## **Assignment Task 3: Maintain Customer Contact Records**

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### **Overview of Task**

You are to demonstrate your skills and abilities in maintaining customer contact records accurately.

### **What resources do I need to complete this task?**

- Access to the Learning Guide
- Access to a computer and the Internet
- Access to word processing software
- Access to Simulated Accounts Receivable Policy and Procedures
- Access to the Resources Folder for documents and additional learning materials

### **Instructions to Students:**

- You must demonstrate your understanding of the issues and procedures related to this task.
- You must demonstrate your practical skills to be able to maintain customer contact records accurately.
- Your work for this project will also be observed over the semester by your Assessor.
- Your Assessor will advise you if you can email your evidence or if you have to print it out and submit hard copies.
- Submit your evidence on time.
- Your evidence must be authentic (original, references, not plagiarised).

### **You will be required to have a good understanding of the following areas:**

- Maintain customer contact records accurately.
- Use data entry and recording systems to maintain and monitor customer accounts and records.

### **Grading**

All supporting documentation requested must be submitted; and demonstrations to the Assessor must meet the criteria specified and to industry standards to gain a satisfactory in this task.

### **Location**

The assessment will take place in the classroom, a Computing Lab, in the field, in a workshop or as otherwise instructed by the Assessor.

## Evidence to submit.

---

Evidence Submitted to Assessor - Tick if submitted (P)		Submitted
Attach this checklist to your Assessment Cover Sheet and evidence		
1	Completed Customer Contact form	<input type="checkbox"/>
2	Assessment Cover Sheet and Evidence List	<input type="checkbox"/>



## Assessment Cover Sheet

Student Name		USI	
Unit of Competency	FNSCR302 Monitor and control accounts receivable - Release 1		
Assessors Name			
Assessment Task 4	Case Study - Identifying breaches and contacting customers		
Submission Date			
Answer the following questions prior to commencing the Assessment Task		Yes	No
Are you ready to be assessed? I understand the assessment instructions and requirements and consent to being assessed. (i.e. you have completed all training and feel confident to undertake the assessment. You know the purpose of the assessment and what resources I can use).			
Do you understand your rights in the assessment process?			
Do you understand the appeal system if you are not happy with your outcomes?			
Do you have any special needs or support to be considered during assessment? (If Yes, advise your Assessor of what support you will need).			
Do you understand that you can apply for Recognition of Prior Learning (RPL) instead of completing the assessment? (i.e. the reason would be that you already have attained this unit or have the knowledge and skills to be assessed immediately without training).			
Do you know what evidence you must submit for this assessment?			
Do you understand the assessment process as explained by your Assessor?			
Student's declaration			
<ul style="list-style-type: none"> <li>• I declare that the evidence I have supplied is my own work.</li> <li>• None of this work has been completed by any other person.</li> <li>• I have not cheated or plagiarised the work or colluded with any other student/s.</li> <li>• I have correctly referenced all resources, reference texts throughout this assessment task.</li> <li>• I understand that if am in breach of this policy that disciplinary action may be taken against me.</li> </ul>			
Student's Signature		Date	

## Assessment Task 4: Record of Outcome

Assessment Task #	Name of Assessment Task	Satisfactory	Not Yet Satisfactory
Assessment Task 4	Identifying breachers and contacting customers	<input type="checkbox"/>	<input type="checkbox"/>
Assessor Statement	I certify that the student being assessed has the skills, knowledge and abilities as described in the unit of competency and associated assessment requirements. The quality, quantity, currency, and relevance of the assessment evidence enabled me to make a judgement of competency for this student. I have uploaded this student's evidence for the RTO to certify and forwarded results to the Administration for entry into RTO Student Management System on the Record of Outcome Form at the end of the Student Assessment Book.		
Feedback to Student			
I acknowledge the feedback provided by my Assessor. Provide any comments below that you wish your Assessor to know.			
Student's signature		Date	
Assessor's name Please print			
Assessor's Signature		Date	

## Assignment Task 4: Case Study - Recognise breaches and contact customers.

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### Overview of Task

You are to demonstrate your skills and abilities in recognising breaches and contacting customers promptly and courteously to bring account within terms.

### What resources do I need to complete this task?

- Access to the Learning Guide
- Access to a computer and the Internet
- Access to word processing software
- Access to Simulated Accounts Receivable Policy and Procedures
- Access to the Resources Folder for documents and additional learning materials

### Instructions to Students:

- You must demonstrate your understanding of the issues and procedures related to this task.
- You must demonstrate your practical skills to be able to communicate with the client.
- Your work for this project will also be observed over the semester by your Assessor.
- Your Assessor will advise you if you can email your evidence or if you have to print it out and submit hard copies.
- Submit your evidence on time.
- Your evidence must be authentic (original, references, not plagiarised).

### You will be required to have a good understanding of the following areas:

- Communicate with the client in a professional, courteous and fair manner.
- Correctly identify customers in breach of terms and conditions.

### Grading

All supporting documentation requested must be submitted; and demonstrations to the Assessor must meet the criteria specified and to industry standards to gain a satisfactory in this task.

### Location

The assessment will take place in the classroom, a Computing Lab, in the field, in a workshop or as otherwise instructed by the Assessor.

XYZ Tech Solutions - send a formal follow-up email reminding them of the overdue payment and the potential consequences.

Smart Innovations Inc. - Issue a late payment notice, emphasizing the impact of late payments on their credit standing.

Reliable Retailers Ltd. - Contact the accounts payable department by email to discuss the overdue payment and explore possible reasons for the delay.

Tech Innovate Co.- Initiate an urgent email to discuss the outstanding payment and recommend a feasible payment plan.

Mega Electronics Enterprises – Write a final demand letter, indicating the intention to escalate the matter legally if payment is not received within a specified timeframe.

In your correspondence with your customers who have breached their terms and conditions, state why they are in breach by clearly state the terms and conditions for each customer and what actions the company is going to take. Propose appropriate next steps for each customer to address the breach and encourage payment. Ensure the email is professional, courteous and fair.

## **Evidence to submit.**

---

Evidence Submitted to Assessor - Tick if submitted (✓)		Submitted
Attach this checklist to your Assessment Cover Sheet and evidence		
1	Late Payment Notice	<input type="checkbox"/>
2	Three Emails (one urgent)	<input type="checkbox"/>
3	Final Demand Letter	<input type="checkbox"/>
4	Assessment Cover Sheet and Evidence List	<input type="checkbox"/>

## Assessment Cover Sheet

Student Name		USI	
Unit of Competency	FNSCR302 Monitor and control accounts receivable - Release 1		
Assessors Name			
Assessment Task 5	Resolving Disputed amounts.		
Submission Date			
Answer the following questions prior to commencing the Assessment Task		Yes	No
Are you ready to be assessed? I understand the assessment instructions and requirements and consent to being assessed.  (i.e. you have completed all training and feel confident to undertake the assessment. You know the purpose of the assessment and what resources I can use).			
Do you understand your rights in the assessment process?			
Do you understand the appeal system if you are not happy with your outcomes?			
Do you have any special needs or support to be considered during assessment?  (If Yes, advise your Assessor of what support you will need).			
Do you understand that you can apply for Recognition of Prior Learning (RPL) instead of completing the assessment?  (i.e. the reason would be that you already have attained this unit or have the knowledge and skills to be assessed immediately without training).			
Do you know what evidence you must submit for this assessment?			
Do you understand the assessment process as explained by your Assessor?			
Student's declaration			
<ul style="list-style-type: none"> <li>• I declare that the evidence I have supplied is my own work.</li> <li>• None of this work has been completed by any other person.</li> <li>• I have not cheated or plagiarised the work or colluded with any other student/s.</li> <li>• I have correctly referenced all resources, reference texts throughout this assessment task.</li> <li>• I understand that if am in breach of this policy that disciplinary action may be taken against me.</li> </ul>			
Student's Signature		Date	

## Assessment Task 5: Record of Outcome

Assessment Task #	Name of Assessment Task	Satisfactory	Not Yet Satisfactory
Assessment Task 5	Resolving Disputed amounts.	<input type="checkbox"/>	<input type="checkbox"/>
Assessor Statement	I certify that the student being assessed has the skills, knowledge and abilities as described in the unit of competency and associated assessment requirements. The quality, quantity, currency, and relevance of the assessment evidence enabled me to make a judgement of competency for this student. I have uploaded this student's evidence for the RTO to certify and forwarded results to the Administration for entry into RTO Student Management System on the Record of Outcome Form at the end of the Student Assessment Book.		
Feedback to Student			
I acknowledge the feedback provided by my Assessor. Provide any comments below that you wish your Assessor to know.			
Student's signature		Date	
Assessor's name Please print			
Assessor's Signature		Date	

## **Assessment Task 5: Resolving Disputed amounts.**

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### **Overview of Task**

You are to demonstrate your skills and abilities in resolving disputes.

### **What resources do I need to complete this task?**

- Access to the Learning Guide
- Access to a computer and the Internet
- Access to word processing software
- Access to Simulated Accounts Receivable Policy and Procedures
- Access to the Resources Folder for documents and additional learning materials

### **Instructions to Students:**

- You must demonstrate your understanding of the issues and procedures related to this task.
- You must demonstrate your practical skills to be able to resolve disputed amounts.
- Your work for this project will also be observed over the semester by your Assessor.
- Your Assessor will advise you if you can email your evidence or if you have to print it out and submit hard copies.
- Submit your evidence on time.
- Your evidence must be authentic (original, references, not plagiarised).

### **You will be required to have a good understanding of the following areas:**

1. Resolve disputed amounts within predetermined parameters.
2. Research background of dispute, based on customer outline.
3. Check records thoroughly for verification of all case material.
4. Correctly identify type of dispute and resolve in accordance with organisational policy and procedures.

### **Grading**

All supporting documentation requested must be submitted; and demonstrations to the Assessor must meet the criteria specified and to industry standards to gain a satisfactory in this task.

### **Location**

The assessment will take place in the classroom, a Computing Lab, in the field, in a workshop or as otherwise instructed by the Assessor.

**Respond to the questions**

Q1      How would you check the records to verify the dispute raised by Alpha Innovations Inc. regarding the services not being up to standard?

Q2      What steps would you take to verify Beta Enterprises Ltd.'s dispute regarding incorrect pricing on the invoice, claiming a 5% discount was not applied?

Q3      For Gamma Tech Solutions, how would you know if they had actually paid?



## Evidence to submit.

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Evidence Submitted to Assessor - Tick if submitted (P)		Submitted
Attach this checklist to your Assessment Cover Sheet and evidence		
1	Practical Journals – Task 1 and 2	<input type="checkbox"/>
2	Responses to three questions – Task 3	<input type="checkbox"/>
3	Assessment Cover Sheet and Evidence List	<input type="checkbox"/>

## Record of Assessment Outcomes

This section records all the evidence used to form the final assessment decision. Please document all types of evidence used in this assessment.

Student Name			
Unit of Competency	FNSCR302 Monitor and control accounts receivable - Release 1		
Assessment Requirements	Task Outcomes		
	Satisfactory (S)	Not Satisfactory (NS)	Resubmit
Assessment Task 1: Knowledge Assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment Task 2: Status of Debt and collecting and monitoring monies due.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment Task 3: Maintain Customer Contact Records	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment Task 4: Identifying breaches and contacting customers.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Assessment Task 5: Resolving Disputed amounts.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall Assessment Outcome			
<input type="checkbox"/> Competent	<input type="checkbox"/> Not Yet Competent	<input type="checkbox"/> Resubmit	
If a resubmission is required what additional evidence or corrections are required?			
Assessor Name:			
Assessors Signature:		Date	