# SELF-ASSESSMENT GUIDE

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| Qualification: | | Accounting for freelancing, Level 5 | | |
| Candidate’s Name | |  | | |
| Application SL no | |  | | |
| Instruction:   * + Read each of the questions under each unit of competency in the left-hand column of the chart.   + Place a tick in the appropriate box opposite each question to indicate your answer. | | | | |
| Can I ? | | | YES | NO |
| **unit of competency:** **GU011L4V1: Lead small Team** | | |  |  |
| * Identify and present work requirementsto team members | | |  |  |
| * Communicate reasons for instructions and requirements are to team members | | |  |  |
| * Recognize, discuss team members’ queries and concernsand dealt with | | |  |  |
| * Allocate duties, and responsibilities having regard to the skills, knowledge and attitudes required to properly undertake the assigned task | | |  |  |
| * Allocate duties having regard to individual preference, domestic and personal considerations, whenever possible | | |  |  |
| * Establish performance expectations based on client needs and according to assignment requirements | | |  |  |
| * Establish Performance expectations based on individual team members’ duties and area of responsibility | | |  |  |
| * Discuss and direct Performance expectations are discussed and directed to implement in the workplace | | |  |  |
| * Take corrective action while monitoring of performancearetaken place against defined performance criteria and / or assignment instructions if required | | |  |  |
| * Provide feedback team members, positive support and advice on strategies to overcome any deficiencies | | |  |  |
| * Reference to appropriate personnel about performance issueswhich cannot be rectified or addressed within the team | | |  |  |
| * Informe team members of any changes in the priority allocated to assignments or tasks which might impact on clients’ / customers’ needs and satisfaction | | |  |  |
| * Monitor team operations to ensure that employer / client needs and requirements are met | | |  |  |
| * Provide follow-up communication on all issues affecting the team | | |  |  |
| * Completed all relevant documentation | | |  |  |
| **unit of competency:** **GU09L3V1:** **Practice Negotiation Skills** | | |  |  |
| * Identify information on preparing for negotiation and included in the plan. | | |  |  |
| * Identify information on creating non-verbal environments for positive negotiating and included in the plan. | | |  |  |
| * Identify information on active listening and included in the plan | | |  |  |
| * Identify information on different questioning techniques is identified and included in the plan | | |  |  |
| * Check information to ensure it is correct and up-to-date | | |  |  |
| * Agree on criteria for successful outcome upon by all parties | | |  |  |
| * Consider desired outcome of all parties | | |  |  |
| * Use appropriate language throughout the negotiation | | |  |  |
| * Use a variety of questioning techniques | | |  |  |
| * Document and agree the issues and processes are upon by all parties | | |  |  |
| * Discuss and assess possible solutions and their viability | | |  |  |
| * Confirm and record areas for agreement. | | |  |  |
| * Agree follow-up action upon by all parties | | |  |  |
| **Unit of competency:** **OUAF004L5V1: Manage a Project** | | |  |  |
| * Identify project requirements as per client’s instruction | | |  |  |
| * Determine project objectives as required | | |  |  |
| * Outline and define project | | |  |  |
| * Finalize project scope in consultation with client | | |  |  |
| * Identify tasks as per scope of the project | | |  |  |
| * Define tasks as per requirements | | |  |  |
| * Finalize tasks | | |  |  |
| * Outline Project plan | | |  |  |
| * Create and document project | | |  |  |
| * Monitor project | | |  |  |
| * Review and deliver project | | |  |  |
| **unit of competency:** **OUAF005L5V1: Use Spreadsheets (Advanced)** | | |  |  |
| * Select functions as required | | |  |  |
| * Use functions as per requirements | | |  |  |
| * Access data as per client’s requirements | | |  |  |
| * Select chart type as per client’s requirements | | |  |  |
| * Created chart as required | | |  |  |
| * Format chart as required | | |  |  |
| * Present chart as required | | |  |  |
| * Access data as per client’s requirements | | |  |  |
| * Format data as table | | |  |  |
| * Design report in pivot as requirement | | |  |  |
| * Submit report to client | | |  |  |
| * Select tools as required. | | |  |  |
| * Use tools as per requirements | | |  |  |
| * Collect and consolidate data as per client’s requirements. | | |  |  |
| * Clean and structure data as required | | |  |  |
| * Analyze data according to requirements. | | |  |  |
| * Visualized data in dashboard | | |  |  |
| * Submit to client as required | | |  |  |
| * determine project type | | |  |  |
| * Design structure of project | | |  |  |
| * Develop project as per design | | |  |  |
| **Unit of Competency:** **OUAF006L5V1: Perform Accounting using accounting software packages (Advanced)** | | |  |  |
| * Select application package as required | | |  |  |
| * Create company profile in software | | |  |  |
| * Create groups/accounts type | | |  |  |
| * Created Ledgers under Groups | | |  |  |
| * Create Groups/Inventory Category | | |  |  |
| * Create items under Groups | | |  |  |
| * Create units of measure | | |  |  |
| * Interpret client’s requirement | | |  |  |
| * Interface is configured as per client’s requirements | | |  |  |
| * Assess customization requirement | | |  |  |
| * Check resources for customization | | |  |  |
| * Do customization | | |  |  |
| * Access transactions records | | |  |  |
| * Analyze and check transaction record and take correcting measures as required | | |  |  |
| * Give final approval to transaction | | |  |  |
| * Reviewed transactions | | |  |  |
| * Prepare and record Journals | | |  |  |
| * Adjust un-earned revenue prepayments and accruals | | |  |  |
| * Reviewed opening balance | | |  |  |
| * Review depreciation and amortization rates | | |  |  |
| * Review new transactions | | |  |  |
| * Record transactions in the register as per defined accounting standard | | |  |  |
| * Prepare and record monthly journals as per defined accounting standard | | |  |  |
| * Prepare and record adjustments as per defined accounting standard | | |  |  |
| * Manage non-current asset register as per accounting standard | | |  |  |
| * Collect source documents | | |  |  |
| * Reconcile reconcilable ledgers | | |  |  |
| * Performed bank reconciliations | | |  |  |
| * Collect detailed information ofemployees related to tax | | |  |  |
| * Calculate payroll as required | | |  |  |
| * Calculate tax deductions and record as per standard rules | | |  |  |
| * Generate payslips as per requirement | | |  |  |
| * Access and obtain information required to compute taxes | | |  |  |
| * Compute tax as per standard rules | | |  |  |
| * Record tax as per standard procedure | | |  |  |
| * Configure reports as required | | |  |  |
| * Reports are generated | | |  |  |
| * Submit reports according to requirement | | |  |  |
| **Unit of Competency:** **OUAF007L5V1: Prepare project proposal** | | |  |  |
| * Collect requirements from the client through standard data/information gathering techniques | | |  |  |
| * Assessed requirements | | |  |  |
| * Review and confirm requirements in consultation with clients | | |  |  |
| * Identify accounting tasks as per client requirement | | |  |  |
| * Determine elements of project proposal as per client requirement | | |  |  |
| * Identify develop effort, resources, time and cost estimation as per accounting options | | |  |  |
| * Select work samples | | |  |  |
| * Calculate development cost as required | | |  |  |
| * Prepare project proposal per client requirements | | |  |  |
| * Present project proposal to clients as per standard procedure | | |  |  |
| Candidate’s Signature |  | | Date: | |
| Assessor’s Signature |  | | Date: | |

COMPETENCY ASSESSMENT AGREEMENT

**Accounting for freelancing, Level 5**

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| --- | --- | --- | --- |
| Candidate’s Name: |  | | |
| Assessor’s Name: |  | | |
| Qualification/Units of Competency to be Assessed | GU011L4V1: Lead small Team  GU09L3V1: Practice Negotiation Skills  Unit of competency: OUAF004L5V1: Manage a Project  OUAF005L5V1: Use Spreadsheets (Advanced)  OUAF006L5V1: Perform Accounting using accounting software packages (Advanced)  OUAF007L5V1: Prepare project proposal | | |
| Candidate to answer the question: | | Yes | No |
| * Have the context and purpose of assessment been explained | |  |  |
| * Have the qualification and units of competency been explained? | |  |  |
| * Have the Project-Based Assessment been explained? | |  |  |
| * Do you understand the assessment procedure and evidence to be collected? | |  |  |
| * Have your rights and appeal system been explained? | |  |  |
| * Have you discussed any special needs to be considered during assessment? | |  |  |
| I agree to undertake assessment in the knowledge that information gathered will only be used for professional development purposes and can only be accessed by concerned personnel and my manager/supervisor. | | | |
| Candidate’s Signature: | | Date: | |
| Assessor’s Signature: | | Date: | |