# 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**

|  |  |
| --- | --- |
| 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: |