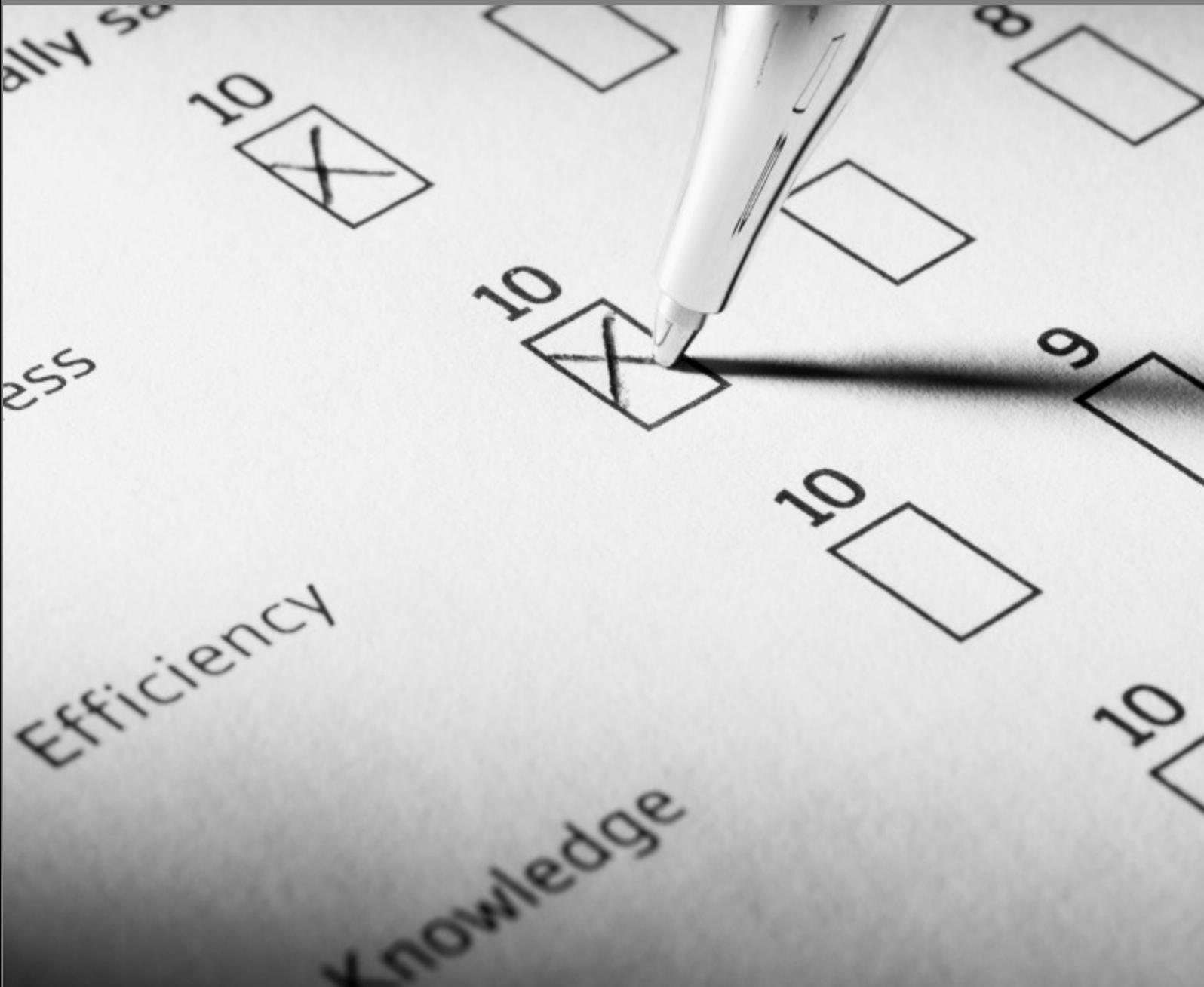# Operate a private automatic branch exchange (PABX) switchboard

D1.HFO.CL2.08

Assessor Manual

Operate a private automatic branch exchange (PABX) switchboard

D1.HFO.CL2.08

Assessor Manual

The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.

The ASEAN Secretariat is based in Jakarta, Indonesia.

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Competency Based Assessment (CBA) – An Introduction for Assessors

Assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency.

Suggested Assessment Methods

For each unit of competency a number of assessment tools have been identified including:

- Work Projects
- Oral Questions
- Written Questions
- Third Party Statements
- Observation Checklists.

Instructions and Evidence Recording Sheets have been identified in this Assessment Manual for use by Assessors.

Alternative Assessment Methods

Whilst the above mentioned assessment methods are suggested assessment methods, the assessor may use an alternate method of assessment taking into account:

a) The nature of the unit

b) The strengths of participants

c) The number of participants in the class

d) Time required to complete assessments

e) Time dedicated to assessment

f) Equipment and resources required.

Alternate assessment methods include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals/slides/audiotapes
- Case Studies
- Log books

- Projects and Role plays
- Group projects
- Recognition of Prior Learning.

Whilst there is no specific instruction or evidence collection documents for all the alternative assessment methods, assessors can record competency in the 'Other' section within the 'Competency Recording Sheet'.

Selection of Assessment Methods

Each assessor will determine the combination of Assessment Methods to be used to determine Competency for each Competency Unit on a student by student basis.

'Sufficient' evidence to support the 'Pass Competent'/'Not Yet Competent' decision must be captured.

In practice this means a minimum of 2 – 3 Assessment Methods for each candidate for each Competency Element is suggested.

At least one method should provide evidence of practical demonstration of competence.

The following assessment methods deemed to provide evidence of practical demonstration of competence include:

- Practical Work Projects
- Third Party Statement
- Observation Checklist.

Assessing Competency

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- 'Pass Competent' (PC)
- 'Not Yet Competent' (NYC).

Pass Competent (PC)

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as 'Pass Competent' (PC).

The assessor will award a 'Pass Competent' (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

Not Yet Competent' (NYC)

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be 'Not Yet Competent' (NYC).

This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

a) Undertake further training or instruction

b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.

Regional Qualifications Framework and Skills Recognition System

The 'Regional Qualifications Framework and Skills Recognition System', also known as the 'RQFSRS' is the overriding educational framework for the ASEAN region.

The purpose of this framework is to provide:

- A standardised teaching and assessment framework

- Mutual recognition of participant achievement across the ASEAN region. This includes achievement in individual Units of Competency or qualifications as a whole.

The role of the 'RQFSRS' is to provide, ensure and maintain 'quality assurance' across all countries and educational providers across the ASEAN region.

Recognition of Prior Learning (RPL)

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

This process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)

- Skills auditing

- Gap analysis and training

- Credit transfer.

Code of Practice for Assessors

This Code of Practice provides:

- Assessors with direction on the standard of practice expected of them

- Candidates with assurance of the standards of practice expected of assessors

- Employers with assurance of the standards maintained in the conduct of assessment.

The Code detailed below is based on the International Code of Ethics and Practice (The National Council for Measurement in Education [NCME]):

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity

- Potential forms of conflict of interest in the assessment process and/or outcomes are identified and appropriate referrals are made, if necessary

- All forms of harassment are avoided throughout the planning, conducting, reviewing and reporting of the assessment outcomes

- The rights of the candidate are protected during and after the assessment

- Personal and interpersonal factors that are not relevant to the assessment of competency must not influence the assessment outcomes

- The candidate is made aware of rights and process of appeal

- Evidence that is gathered during the assessment is verified for validity, reliability, authenticity, sufficiency and currency

- Assessment decisions are based on available evidence that can be produced and verified by another assessor

- Assessments are conducted within the boundaries of the assessment system policies and procedures

- Formal agreement is obtained from both the candidate and the assessor that the assessment was carried out in accordance with agreed procedures

- The candidate is informed of all assessment reporting processes prior to the assessment

- The candidate is informed of all known potential consequences of decisions arising from an assessment, prior to the assessment

- Confidentiality is maintained regarding assessment results

- The assessment results are used consistently with the purposes explained to the candidate

- Opportunities are created for technical assistance in planning, conducting and reviewing assessment procedures and outcomes.

Instructions and Checklist for Assessors

Instructions

General instructions for the assessment:

- Assessment should be conducted at a scheduled time that has been notified to the candidate

- Facilitators must ensure participants are made aware of the need to complete assessments and attend assessment sessions

- If a participant is unable to attend a scheduled session, they must make arrangements with the Assessor to undertake the assessment at an alternative time

- At the end of the assessment the Assessor must give feedback and advise the participant on their PC/NYC status

- Complete the relevant documentation and submit to the appropriate department.

Preparation

- Gain familiarity with the Unit of Competency, Elements of Competency and the Performance Criteria expected

- Study details assessment documentation and requirements

- Brief candidate regarding all assessment criteria and requirements.

Briefing checklist

- Begin the assessment by implementing the following checklist and then invite the candidate to proceed with assessment.

Checklist for Assessors

	Tick (✓)	Remarks
Prior to the assessment I have:		
Ensured the candidate is informed about the venue and schedule of assessment.		
Received current copies of the performance criteria to be assessed, assessment plan, evidence gathering plan, assessment checklist, appeal form and the company's standard operating procedures (SOP).		
Reviewed the performance criteria and evidence plan to ensure I clearly understood the instructions and the requirements of the assessment process.		
Identified and accommodated any special needs of the candidate.		
Checked the set-up and resources for the assessment.		
During the assessment I have:		
Introduced myself and confirmed identities of candidates.		
Put candidates at ease by being friendly and helpful.		
Explained to candidates the purpose, context and benefits of the assessment.		
Ensured candidates understood the assessment process and all attendant procedures.		
Provided candidates with an overview of performance criteria to be assessed.		
Explained the results reporting procedure.		
Encouraged candidates to seek clarifications if in doubt.		
Asked candidates for feedback on the assessment.		
Explained legal, safety and ethical issues, if applicable.		
After the assessment I have:		
Ensured candidate is given constructive feedback.		
Completed and signed the assessment record.		
Thanked candidate for participating in the assessment.		

Instructions for Recording Competency

Specifications for Recording Competency

The following specifications apply to the preparation of Evidence Gathering Plans:

- A Competency Recording Sheet must be prepared for each candidate to ensure and demonstrate all Performance Criteria and Competency Elements are appropriately assessed. This Sheet indicates how the Assessor will gather evidence during their assessment of each candidate

- This Competency Recording Sheet is located at the end of the Assessment Plan

- It is the overriding document to record competency

- The Assessor may vary the Competency Recording Sheet to accommodate practical and individual candidate and/or workplace needs

- Assessor must place a tick (✓) in the 'Assessment Method' columns to identify the methods of assessment to be used for each candidate

- Multiple Competency Elements/Performance Criteria may be assessed at the one time, where appropriate

- The assessor and participant should sign and date the Competency Recording Sheet, when all forms of evidence and assessment have been completed

- The assessor may provide and feedback or clarify questions which the participant may have in regards to the assessment grade or findings

- All documents used to capture evidence must be retained, and attached to the Competency Recording Sheet for each candidate for each Competency Unit.

Instructions for Different Assessment Methods

Specifications for Work Project Assessment

These guidelines concern the use of work projects.

The work projects identified in the Training Manuals involve a range of tasks, to be performed at the discretion of the Assessor.

Work project tasks can be completed through any form of assessment as identified in the Trainer and Trainee Manuals and stated at the start of this section.

Assessors should follow these guidelines:

- Review the Work Projects at the end of each 'Element of Competency' in the Trainee Manual to ensure you understand the content and what is expected

- Prepare sufficient resources for the completion of work activities including:

    - Time – whether in scheduled delivery hours or suggested time participants to spend outside of class hours

    - Resources – this may involve technical equipment, computer, internet access, stationery and other supplementary materials and documents

- Prepare assessment location (if done in class) making it conducive to assessment

- Explain Work Projects assessment to candidate, at the start of each Element of Competency. This ensures that participants are aware of what is expected and can collate information as delivery takes place

- Assessors can use the following phrase as a guide (where an 'X' is identified, please input appropriate information):

  "At the end of each Element of Competency there are Work Projects which must be completed. These projects require different tasks that must be completed.

  These work projects are part of the formal assessment for the unit of competency titled X:

  - You are required to complete these activities:

    a) Using the 'X' method of assessment

    b) At 'X' location

    c) You will have 'X time period' for this assessment

  - You are required to compile information in a format that you feel is appropriate to the assessment

  - Do you have any questions about this assessment?"

- Commence Work Project assessment:

  - The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions

  - Participants complete work projects in the most appropriate format

  - Participants must submit Work Project evidence to the assessor before the scheduled due date

- Assessor must assess the participant's evidence against the competency standards specified in each Element of Competency and their own understanding. The assessor can determine if the participant has provided evidence to a 'competent' standard

- Transcribe results/details to Competency Recording Sheet

- Forward/file assessment record.

Specifications for Oral Question Assessment

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:

  - Enter Student name

  - Enter Assessor name

  - Enter Location

- Familiarise self with Questions to be asked

- Prepare assessment location (table and chairs) making it conducive to assessment

- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These oral questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability and I will record whether or not you have answered correctly.

  We have 60 minutes for this assessment.

    - I will give you feedback at the end of the assessment
    - Do you have any questions about this assessment?"

- Commence Oral Questioning assessment:
    - Complete Assessment Record for the Oral Questioning by:
        a) Ticking PC or NYC, as appropriate
        b) Entering 'Remarks' as required
        c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Written Question Assessment

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

- Familiarise self with Questions and Answers provided

- Print and distribute copies of 'Written Questions' for participants. Ideally this should take place with adequate time for participants to answer all questions before the expected due date

- Explain Written Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These written questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability.

  You may refer to your subject materials, however where possible try to utilise your existing knowledge when answering questions.

  Where you are unsure of questions, please ask the Assessor for further instruction. This may be answering the question orally or asking the assessor to redefine the question.

  We have X time for this assessment:

    - The due date for completion of this assessment is X
    - On this date you must forward the completed questions to the assessor by X time on the date of X
    - Do you have any questions about this assessment?"

- The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions

- Participants may record written answers (where possible)

- Participants must submit the written answers to the assessor before the scheduled due date

- Assessor must assess the participant's written answers against the model answers provided as a guide, or their own understanding. The assessor can determine if the participant has answered the questions to a 'competent' standard

- Transcribe results/details to Competency Recording Sheet

- Forward/file assessment record.

Specifications for Observation Checklist

These specifications apply to the use of the Observation Checklist in determining competency for candidates.

Only an approved assessor is authorised to complete the Observation Checklist.

The assessor is required to observe the participant, ideally in a simulated environment or their practical workplace setting and record their performance (or otherwise) of the competencies listed on the Observation Checklist for the Competency Unit.

To complete the Observation Checklist the Assessor must:

- Insert name of candidate

- Insert assessor name

- Insert identify of location where observations are being undertaken

- Insert date/s of observations – may be single date or multiple dates

- Place a tick in either the 'Yes' or 'No' box for each listed Performance Criteria to indicate the candidate has demonstrated/not demonstrated that skill

- Provide written (and verbal) feedback to candidate – as/if appropriate

- Sign and date the form

- Present form to candidate for them to sign and date

- Transcribe results/details to Competency Recording Sheet for candidate

- Forward/file Observation Checklist.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the participant.

Specifications for Third Party Statement

These specifications relate to the use of a relevant workplace person to assist in determining competency for candidates.

The Third Party Statement is to be supplied by the assessor to a person in the workplace who supervises and/or works closely with the participant.

This may be their Supervisor, the venue manager, the Department Manager or similar.

The Third Party Statement asks the Supervisor to record what they believe to be the competencies of the participant based on their workplace experience of the participant. This experience may be gained through observation of their workplace performance, feedback from others, inspection of candidate's work etc.

A meeting must take place between the Assessor and the Third Party to explain and demonstrate the use of the Third Party Statement.

To complete the Third Party Verification Statement the Assessor must:

• Insert candidate name

• Insert name and contact details of the Third Party

• Tick the box to indicate the relationship of the Third Party to the candidate

• Present the partially completed form to the Third Party for them to finalise

• Collect the completed form from the Third Party

• Transcribe results/details to Competency Recording Sheet for candidate

• Forward/file Third Party Statement.

The Third Party must:

• Record their belief regarding candidate ability/competency as either:

  ▪ Pass Competent = Yes

  ▪ Not Yet Competent = No

  ▪ Unsure about whether candidate is competent or not = Not Sure

• Meet briefly with the assessor to discuss and/or clarify the form.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the candidate.

A separate Third Party Statement is required for each Competency Unit undertaken by the candidate.

Competency Standard

UNIT TITLE: OPERATE A PRIVATE AUTOMATIC BRANCH EXCHANGE (PABX) SWITCHBOARD	NOMINAL HOURS: 25

UNIT NUMBER: D1.HFO.CL2.08

UNIT DESCRIPTOR: This unit deals with skills and knowledge required to operate a Private Automatic Branch Exchange (PABX) switchboard and addresses basic programming requirements

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE
Element 1: Define the PABX system and features 1.1 *Name the PABX system* in use 1.2 Describe the *devices connected to the system* 1.3 Identify the functions of the *system keys and lights* 1.4 Identify the *command structure* for the system **Element 2: Demonstrate operational features of the system** 2.1 *Write text* 2.2 *Create a password* 2.3 *Handle directory numbers* 2.4 *Handle category lists* 2.5 *Allocate programmable keys and numbers* 2.6 *Allocate functions to programmable keys* 2.7 *Record telephone conversation*	**Unit Variables** The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. This unit applies to all industry sectors that use, or plan to introduce, a PABX switchboard into their organisation within the labour divisions of the hotel and travel industries and may include: 1. Front Office **Note:** there are many manufacturers of PABX switchboards and many variations in terms of models, sizes and available functions and facilities. The operation of each system is potentially different and unique to each system requiring reference to the manufacturer's instructions, such as operator's manual, user manual and system administrator's manual in all instances. *Name the PABX system* may include: • Identifying the manufacturer • Identifying the type, model and capacity of the system • Obtaining a copy of the manufacturer's instructions.

2.8 *Program call forwarding functions*	*Devices connected to the system* may include:
2.9 *Store commonly called numbers*	• Telephone handsets, including variations in use, as applicable, for reception/operator, offices, guest rooms and departments
2.10 *Demonstrate call metering functions*	• Accessories, where fitted, including tape recorder, extra bell, busy indicator outside door, Universal Serial Bus (USB) connector, extra handset, Personal Computer (PC) card, headset and conference unit.
2.11 *Demonstrate internal message functions*	
2.12 *Demonstrate mailbox system functions*	
2.13 Set *date and time*	*System keys and lights* may include:
2.14 Demonstrate use of *special system features*	• Keys, including clear, headset, loudspeaker, mute, programmable function keys, volume, alpha-numeric keys, star, hash
Element 3: Process telephone calls	• Lights, including busy, call waiting, message, hold, incoming call, active.
3.1 *Demonstrate placing an out-going call*	*Command structure* will vary between models/systems and refers to types of commands which may relate to:
3.2 *Demonstrate receiving an in-coming call*	• Extensions, trunks, system facilities, trunk answering position, trunk link signal, operating, maintenance, hotel and paging, extension parameters, programmable keys, mailboxes, number analysis, internal and external numbers, facility access, loudspeaker paging, group-related data, common data, voice answer, operator functions, message and information data, voice announcement recording, password definition, authority levels, control of directory numbers, show number plan, date and time, administration data, reminder, pager receiver, call metering, message group parameters and guest extension
	• Hotel, including room status change, room-to-room bar, room-to-room open, hotel answering position, wake up options and guest instrument keys.
	Write text may relate to:
	• Following manufacturer's instructions
	• Confirming a system value, including entering yes/no to available system options
	• Adding names to extensions
	• Creating and changing passwords.

Create a password may relate to:

- Following manufacturer's instructions
- Generating a password to move from the system default setting(s)
- Altering passwords in accordance with internal security requirements
- Reading out cost counters for nominated directory numbers.

Handle directory numbers may relate to:

- Following manufacturer's instructions
- Assigning numbers to extensions and external lines
- Assigning a facility group number
- Assigning names
- Storing directory numbers
- Assigning numbers to trunks
- Reading directory numbers
- Listing directory numbers
- Changing positions of extension numbers.

Handle category lists may relate to:

- Following manufacturer's instructions
- Grouping similar user types, such as departments and classifications of staff
- Allocating prescribed functions and facilities
- Allocating extensions and trunks.

Allocate programmable keys and numbers may relate to:

- Following manufacturer's instructions
- Re-allocating the number of programmable keys following installation of a new telephone or key panel
- Assigning individual abbreviated numbers
- Using allocation tables for number of programmable keys and individual abbreviated numbers.

Allocate functions to programmable keys may relate to:

- Following manufacturer's instructions
- Name selection function
- External line function
- Supervisor function
- Loudspeaker paging function
- Immediate answer function
- Enter key function
- Account number function
- Number secrecy function
- Caller identification function.

Record telephone conversation may include:

- Following manufacturer's instructions
- Complying with relevant host country legislation
- Initiating the recording function
- Seeking permission to record the call
- Playing back the conversation for later reference
- Erasing the recorded call.

Program call forwarding functions may relate to:

- Following manufacturer's instructions
- Active call diversion
- Diversion for no reply to internal and/or external calls
- Diversion when line busy
- Programming relevant call forwarding address
- Enabling by-pass of call forwarding function.

Store commonly called numbers may include:

- Following manufacturer's instructions
- Identifying required numbers
- Determining category lists for commonly called numbers
- Allocating storage locations
- Entering and confirming correct storage and access
- Allocating categories for extensions.

Demonstrate call metering functions may relate to:

- Following manufacturer's instructions
- Own cost counters
- Other cost counters
- Reading, printing and re-setting cost counters
- Programming required currency identifiers.

Demonstrate internal message functions may include:

- Following manufacturer's instructions
- Controlling call-back message
- Making and retrieving voice messages
- Sending text messages
- Controlling internal message functions such as:
  - send messages for others
  - send voice messages
  - send text messages
  - send 'call me' messages
- Applying command group functions
- Applying password protocols for retrieving messages.

Demonstrate mailbox system functions may include:

- Following manufacturer's instructions
- Recording mailbox messages and greetings
- Changing mailbox messages and greetings
- Accessing mailboxes
- Controlling extension access to mailboxes
- Facilitating common mailbox use.

Date and time may include:

- Following manufacturer's instructions
- Date, including year, month and day format
- Day of the week
- Time of day, including hour, minute and second
- 12-hour or 24-hour clock format.

Special system features may include:

- Following manufacturer's instructions
- Call back
- Break-in to call
- Camp-on call
- Reminders, including ringing time, pause time and reminder attempts
- Conference call.

Demonstrate placing an out-going call may include:

- Following manufacturer's instructions
- Placing an external call personally
- Placing an internal call personally to an extension
- Placing an external call on behalf of a third party

- Placing an internal call on behalf of a third party
- Transferring calls
- Placing a call using stored numbers
- Placing a call using the alpha-numeric keys
- Recording an out-going call
- Adhering to host enterprise telephone procedures.

Demonstrate receiving an in-coming call may include:

- Following manufacturer's instructions
- Answering a call from an external caller
- Answering a call from an internal caller
- Using the system to differentiate between internal and external calls
- Placing calls on hold
- Transferring calls
- Adhering to host enterprise telephone procedures
- Recording an in-coming call.

Assessment Guide

The following skills and knowledge must be assessed as part of this unit:

- The enterprise's policies and procedures in regard to the operation of the telephone system, including legal and privacy issues
- Principles of telephone communication and techniques
- Knowledge of the features and facilities available as relevant to the system in use
- Knowledge of the legal requirements that apply to the recording and playing of telephone messages, as prescribed by the host country
- Knowledge of authorisation levels for use of the functions that are available.

Linkages To Other Units

- Communicate on the telephone
- Work effectively with colleagues and customers
- Maintain quality customer/guest service
- Work cooperatively in a general administration environment
- Use common business tools and technology
- Receive and place in-coming phone calls
- Facilitate out-going phone calls
- Provide international (IDD) service information.

Critical Aspects of Assessment

Evidence of the following is essential:

- Understanding of host enterprise policies and procedures in regard to the operation of the telephone system, including legal and privacy issues
- Demonstrated ability to effectively and efficiently operate a nominated PABX system to undertake designated tasks, where provided for by the system, which must include:
  - Placing at least three out-going calls to an external number using stored number function
  - Placing at least three out-going calls to an internal number/extension using stored number function
  - Receiving at least three in-coming calls from external numbers
  - Receiving at least three in-coming calls from internal numbers
  - Transferring at least three calls to nominated extensions
  - Placing at least three calls on hold and successfully restoring connection
  - Recording a voice message on a reorder/mailbox
  - Setting the date and time
  - Adding at least three given numbers to the number storage function of the system
  - Altering at least one password
  - Using a headset to process at least three calls
  - Undertaking at least five other nominated functions.

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Context of Assessment

This unit may be assessed on or off the job:

- Assessment should include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge
- Assessment must relate to the individual's work area or area of responsibility.

Resource Implications

Training and assessment to include access to a real or simulated workplace and PABX switchboard system; and access to workplace standards, procedures, policies, guidelines, tools and equipment.

Assessment Methods

The following methods may be used to assess competency for this unit:

- Case studies
- Observation of practical candidate performance
- Oral and written questions
- Role plays
- Third party reports completed by a supervisor
- Project and assignment work.

Key Competencies in this Unit

Level 1 = competence to undertake tasks effectively

Level 2 = competence to manage tasks

Level 3 = competence to use concepts for evaluating

Key Competencies	Level	Examples
Collecting, organising and analysing information	1	Capture details for entry onto the PABX system
Communicating ideas and information	1	Advise callers regarding calls
Planning and organising activities	1	Identify the sequence for answering and processing calls during busy periods
Working with others and in teams	1	Liaise with other staff in relation to functions and facilities available through the system
Using mathematical ideas and techniques	1	Determine cost of calls through cost counters
Solving problems	1	Locate required person while placing call on hold
Using technology	1	Use the PABX system at the workplace

Oral Questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Operate a private automatic branch exchange (PABX) switchboard D1.HFO.CL2.08
Instructions	1. Ask student questions from the attached list to confirm knowledge, as necessary 2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC') 3. Write short-form student answer in the space provided for each question.

Questions	Response	
	PC	NYC
1. What PABX system are you using in your workplace?	❑	❑
2. What devices are fitted to your system?	❑	❑

Questions	Response	
	PC	NYC
3. Name three system keys and tell me their function.	❑	❑
4. What is the command structure for your workplace PABX?	❑	❑
5. Give me three occasions where you are required to write text when using your PABX. How do you do this?	❑	❑

Questions	Response	
	PC	**NYC**
6. When do you need to create a password when using your PABX system? How do you do this?	❏	❏
7. Tell me how you assign a name to an extension number.	❏	❏
8. What are 'category lists' and how do you use them on the PABX in your workplace?	❏	❏

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Written Questions

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Student Name: _____

Answer all the following questions and submit to your Trainer.

1.   What does PABX stand for?

_____

_____

_____

2.   Name one brand of PABX system

_____

_____

_____

3.   Name 2 benefits to a small business to have a PABX system

_____

_____

_____

4.   Describe 2 devices that can be connected to the system

_____

_____

_____

_____

5.   Describe what the "MUTE" button is used for

_____

_____

_____

6.   Name one function that can be displayed on the screen display

_____

_____

_____

_____

7.   What is Call Pick Up?

_____

_____

_____

8.   Name 2 pieces of telephone data that are represented as administration data

_____

_____

_____

_____

9.   When writing text, is it permitted to use texting language?

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10. What is the benefit of using a password?

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11. What is recommended to do to passwords regularly?

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12. Name 3 numbers are included in a corporate directory

_____

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13. What are category lists?

_____

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14. Give 2 examples of Category lists

_____

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15. What do you need to do when programming in abbreviated dial numbers?

_____

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16. What is an immediate answer function from programmable keys?

_____

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17. Describe the supervisor function or programmable keys

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18. What 2 factors must you take into account when recording a call?

_____

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19. Why is it important to erase a recorded conversation?

_____

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20. What is call forwarding?

_____

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_____

21. Give 2 examples of your answer to Question 20

_____

_____

_____

_____

22. What sort of numbers would be put into commonly stored numbers and why?

_____

_____

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23. What is call metering?

_____

_____

_____

Assessor Manual
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24.   Name 2 internal message functions

_____

_____

_____

_____

25.   Suggest 3 procedures to set up a personal voice mail box

_____

_____

_____

_____

26.   What is message broadcasting?

_____

_____

_____

27.   Why is it important to use the date and time function on the system?

_____

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28.   Call back is a special system feature – what is it?

_____

_____

_____

29.   Using your telephone system describe how you would make an outgoing call

_____

_____

_____

_____

30. Using you telephone system describe how you would make an in- coming call

_____

_____

_____

_____

Answers to Written Questions

Operate a private automatic branch exchange (PABX) switchboard – D1.HFO.CL2.08

The following are model answers only – Trainers/Assessors must use discretion when determining whether or not an answer provided by a Student is acceptable or not.

1.   **What does PABX stand for?**

     Private automatic branch exchange.

2.   **Name one brand of PABX system**

     • LG Ericsson IPECS

     • Samsung – enterprise IP solution

     • Panasonic business telephone systems

     • CRISCO.

3.   **Name 2 benefits to a small business to have a PABX system**

     • More professional

     • Improve communications

     • Save money.

4.   **Describe 2 devices that can be connected to the system**

     • Handsets

     • Cordless phones

     • Automatic Announcements Devices

     • E-Call plug in

     • Room status update

     • Wake up calls

     • Personalised answering system.

5.   **Describe what the "MUTE" button is used for**

     Allows you to talk and your voice will not be heard by the caller.

6.   Name one function that can be displayed on the screen display

- Directory

- Name and room number of guest

- Extension number.

7.   What is Call Pick Up?

Enables you to pick up a call from another person's phone.

8.   Name 2 pieces of telephone data that are represented as administration data?

- Call times

- Date of call

- Number called

- Cost of call

- Length of call

- Extension called from.

9.   When writing text, is it permitted to use texting language?

No.

10.   What is the benefit of using a password?

Limits the amount of access staff have to various levels of information.

11.   What is recommended to do to passwords regularly?

To be changed regularly.

12.   Name 3 numbers are included in a corporate directory?

- Frequently called numbers

- Emergency numbers

- Staff names & numbers

- Guest names and numbers.

13.   What are category lists?

Group lists of numbers that are similar.

14.   Give 2 examples of Category lists

- All the phone numbers for the Bars
- All the restaurant phone numbers
- Corporate secretaries
- All housekeeping supervisors.

15.   What do you need to do when programming in abbreviated dial numbers?

Follow the instructions, call the number to check it is working, and make any adjustments if necessary.

16.   What is an immediate answer function from programmable keys?

When a programmed message is activated after one or two rings. You might even have to choose from options.

17.   Describe the supervisor function or programmable keys

When new staff are in training and the supervisor might be on the same line as the trainee to check on telephone technique.

18.   What 2 factors must you take into account when recording a call?

- Manufacturer's instructions
- Legal obligations of your country/city.

19.   Why is it important to erase a recorded conversation?

Due to limited capacity for recording calls, only keep the recording for as long as necessary.

20.   What is call forwarding?

Allowing incoming calls to be redirected to a third party.

21.   Give 2 examples of your answer to Question 20

Third party is:
- A mobile phone number
- Another number
- Voicemail box.

22.   What sort of numbers would be put into commonly stored numbers and why?

Frequently called numbers – for fast and easy access.

23. What is call metering?

How a call is counted in order to have a charge aligned to it.

24. Name 2 internal message functions

- Send messages to others
- Send voice mail messages
- Send text messages
- Send call me messages
- Use of pagers.

25. Suggest 3 procedures to set up a personal voice mail box

- Be clear and precise
- Use a greeting
- Identify who has been called
- Reason for being unavailable
- Offer alternative contact
- Ask to leave a message.

26. What is message broadcasting?

Provide information on a particular topic to all your staff or colleagues directly into their extension numbers. Record the message and forward it to your distribution list of extension numbers.

27. Why is it important to use the date & time function on the system?

Date & time are used for a majority of administrative records.

28. Call back is a special system feature – what is it?

Calls to a busy or unanswered extension are automatically re-dialled, if you activate the call back process.

29. Using your telephone system describe how you would make an outgoing call?

Check if student has followed the correct instructions for your system.

30. Using your telephone system describe how you would make an incoming call?

Check if student has followed the correct instructions for your system.

Observation Checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Operate a private automatic branch exchange (PABX) switchboard - D1.HFO.CL2.08
Dates of observation	

Instructions	1. Over a period of time observe the student completing each of the following tasks:
	
	    a) Identify the features offered by a computerised reservations systems
	
	    b) Operate the computerised reservation system
	
	    c) Process reservations' communications
	
	2. Enter the date on which the tasks were undertaken
	
	3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise
	
	4. Complete the feedback sections of the form, if required.

Did the candidate…..	Yes	No
Element 1: Define the PABX system and features		
Name the PABX system in use	❑	❑
Describe the devices connected to the system	❑	❑
Identify the functions of the system keys and lights	❑	❑
Identify the command structure for the system	❑	❑

Did the candidate…..	Yes	No
Element 2: Demonstrate operational features of the system		
Write text	❑	❑
Create a password	❑	❑
Handle directory numbers	❑	❑
Handle category lists	❑	❑
Allocate programmable keys and numbers	❑	❑
Allocate functions to programmable keys	❑	❑
Record telephone conversation	❑	❑
Program call forwarding functions	❑	❑
Store commonly called numbers	❑	❑
Demonstrate call metering functions	❑	❑
Demonstrate internal message functions	❑	❑
Demonstrate mailbox system functions	❑	❑
Set date and time	❑	❑
Demonstrate use of special system features	❑	❑
Element 3: Process telephone calls		
Demonstrate placing an out-going call	❑	❑
Demonstrate receiving an in-coming call	❑	❑
Did the student's overall performance meet the standard?	❑	❑

Feedback to student and trainer/assessor			
Strengths:			
Improvements needed:			
General comments:			
Candidate signature		**Date**	
Assessor signature		**Date**	

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Operate a private automatic branch exchange (PABX) switchboard

Third Party Statement

Student name:		
Name of third party:		**Contact no**
Relationship to student:	❑ Employer ❑ Supervisor ❑ Colleague ❑ Other *Please specify:_____* *Please do not complete the form if you are a relative, close friend or have a conflict of interest]*	
Unit of competency:	Operate a private automatic branch exchange (PABX) switchboard D1.HFO.CL2.08	

The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence.

Please answer these questions as a record of their performance while working with you. Thank you for your time.

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	Yes	No	Not sure
Demonstrates ability to name and describe the PABX in use including explanation of the devices connected, functions of system keys and lights and command structure for the system	❑	❑	❑
Writes text to support and facilitate operation of the system	❑	❑	❑
Creates a password according to venue and manufacturer's instructions	❑	❑	❑
Handles directory numbers and category lists	❑	❑	❑
Allocates programmable keys and numbers	❑	❑	❑
Allocates functions to programmable keys	❑	❑	❑
Records telephone conversations	❑	❑	❑
Programs call forwarding functions	❑	❑	❑
Stores commonly called numbers	❑	❑	❑
Demonstrates call metering functions, internal message functions and mailbox system functions	❑	❑	❑
Sets date and time	❑	❑	❑

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	Yes	No	Not sure
Demonstrates use of special system features	❑	❑	❑
Places out-going calls	❑	❑	❑
Receives in-coming calls	❑	❑	❑
Comments/feedback from Third Party to Trainer/Assessor:			

Third party signature: **Date:**

Send to:

Competency Recording Sheet

Name of Student	
Name of Assessor/s	
Unit of Competency	Operate a private automatic branch exchange (PABX) switchboard D1.HFO.CL2.08
Date assessment commenced	
Date assessment finalised	
Assessment decision	Pass Competent / Not Yet Competent (Circle one)
Follow up action required (Insert additional work and assessment required to achieve competency)	
Comments/observations by assessor/s	

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 1: Define the PABX system and features						
Name the PABX system in use						
Describe the devices connected to the system						
Identify the functions of the system keys and lights						
Identify the command structure for the system						
Element 2: Demonstrate operational features of the system						
Write text						
Create a password						
Handle directory numbers						
Handle category lists						
Allocate programmable keys and numbers						
Allocate functions to programmable keys						
Record telephone conversation						
Program call forwarding functions						
Store commonly called numbers						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 2: Demonstrate operational features of the system						
Demonstrate call metering functions						
Demonstrate internal message functions						
Demonstrate mailbox system functions						
Set date and time						
Demonstrate use of special system features						
Element 3: Process telephone calls						
Demonstrate placing an out-going call						
Demonstrate receiving an in-coming call						
Candidate signature			**Date**			
Assessor signature			**Date**			