# Workplace Assessment Task 2 – Observation Form

*(This form is for the assessor’s use only)*

## **Purpose**

This *Observation Form* lists the practical skills that the candidate must demonstrate/perform while completing **Workplace Assessment Task 2.**

This form is to be completed by the candidate’s assessor to document their observations on the candidate’s performance in Workplace Assessment Task 2.

## **Task Overview**

For this task, the candidate is required to provide service information and address enquiries and requests from a customer/client while being observed by the assessor.

How they will complete this will depend on their organisation/workplace and the particular concern of the customer/client.

*E.g., For school settings, this may involve addressing concerns and enquires from students and their parents, assisting them with the enrolment process, etc.; for or community service settings, this may involve providing clients and their families/carers information about services and programs.*

In this task, the candidate will be assessed on their:

* Practical knowledge of their organisation’s services
* Practical skills relevant to addressing customers/clients’ service-related concerns and enquiries.

## **Instructions to the Assessor**

### Before the assessment

* Organise workplace resources required for the candidate to complete this assessment.
* Discuss this assessment task with the candidate, including the practical skills they need to demonstrate during this task and the criteria for satisfactorily demonstrating each skill.
* Review this form with the candidate and address any queries or concerns they may have about it.

### During the assessment

* Observe the candidate as they complete the Workplace Assessment Task.
* For each practical skill listed in this observation form:
  + Tick YES if you confirm you have observed the candidate demonstrate/perform the practical skill.
  + Tick NO if you have not observed the candidate demonstrate/perform the practical skill.
* If you ticked YES, provide the date when you observed the candidate demonstrate the skill.
* Write specific comments on the candidate’s performance in each criterion. Your feedback/insights will help address any area/s for improvement.

### After the assessment

* Complete all parts of the *Observation Form*, including the *Assessor Declaration* on the last page of this form. Your signature must be handwritten.

## **Candidate Details**

|  |  |
| --- | --- |
| Candidate name |  |
| Title/designation |  |

## **Assessor Details**

|  |  |
| --- | --- |
| Candidate is observed and assessed by |  |
| Training Organisation |  |
| Relevant qualifications held |  |

## **Context of the Assessment**

|  |  |  |
| --- | --- | --- |
| Assessment environment | Real workplace | Simulated environment |
| Workplace/organisation |  | |
| Resources required for the assessment | Workplace/organisation or a similar environment  Workplace supervisor  Information about the organisation/workplace products or services  Customers or clients, e.g., community service clients, parents, students, etc. | |

## **Candidate Assessment Briefing**

|  |  |
| --- | --- |
| Date of assessment briefing |  |

|  |  |
| --- | --- |
| **The assessor confirms:** | **YES/NO** |
| 1. They have discussed with the candidate the workplace task they are required to complete for this assessment. | YES  NO |
| 1. The candidate understands they will be assessed while completing this workplace task, as well as any document(s) they will complete as part of this task. | YES  NO |
| 1. They have discussed with the candidate instructions on how they are to undertake the workplace task. | YES  NO |
| 1. They have provided the candidate guidance on how they can satisfactorily complete the task. | YES  NO |
| 1. They have discussed with the candidate the practical skills (listed below) they are required to demonstrate while completing this task. | YES  NO |
| 1. They have addressed the candidate’s questions or concerns about the workplace task and the assessment process. | YES  NO |

# Observation Form

**Instructions to the Assessor:** The criteria below are currently contextualised to a **workplace task involving explaining community service programs to a client.**

Before the assessment, the criteria listed below must be contextualised further to align with the actual document accessed and reviewed by the candidate.

|  |  |
| --- | --- |
| Relevant workplace task | Assessor to specify, e.g. explaining community service programs to a client |

| **During this workplace task:** | **YES/NO** | **Date observed** | **Assessor’s comments** |
| --- | --- | --- | --- |
| 1. The candidate greets the client. | YES  NO |  |  |
| 1. The candidate introduces themselves to the client. | YES  NO |  |  |
| 1. The candidate communicates service-related information to the client.   **IMPORTANT: Assessor to contextualise the criteria below prior to the assessment** |  |  |  |
| 1. The candidate explains to the client their rights, including: |  |  |  |
| * 1. Right to receive quality service | YES  NO |  |  |
| * 1. Right relating to informed consent | YES  NO |  |  |
| * 1. Right to have access to their own personal data/information | YES  NO |  |  |
| * 1. Right to communicate concerns, feedback, and complaints about services | YES  NO |  |  |
| 1. The candidate explains to the client the organisation’s responsibilities as the service provider, including: |  |  |  |
| * 1. Responsibility to provide quality service | YES  NO |  |  |
| * 1. Responsibility to provide the client access to their own personal data/information | YES  NO |  |  |
| * 1. Responsibility for gathering, investigating, and addressing client concerns, feedback, and complaints about services. | YES  NO |  |  |
| 1. The candidate explains to the client their responsibilities as the client’s community service worker, including: |  |  |  |
| * 1. Responsibility to provide quality service | YES  NO |  |  |
| * 1. Responsibility to provide the client with as much information as possible regarding the services they are receiving. | YES  NO |  |  |
| * 1. Responsibility to seek consent from the client. | YES  NO |  |  |
| * 1. Responsibility to always ensure the client’s health and safety. | YES  NO |  |  |
| 1. The candidate explains to the client the service to be provided, including: |  |  |  |
| 1. Terms of the service | YES  NO |  |  |
| 1. Who will be involved in the service provision | YES  NO |  |  |
| 1. Timeframes | YES  NO |  |  |
| 1. How service outcomes will be documented | YES  NO |  |  |
| 1. The candidate communicates service-related information in a manner that is clear and easily understood. |  |  |  |
| 1. The candidate uses the client’s preferred mode of communication.   The assessor to specify below the client’s preferred mode of communication.  (For a satisfactory performance, there must be at least one ticked below):  Auslan  Use of assistive technologies: Assessor to specify  Through the help of interpreter or translation services: Assessor to specify  Others (Please specify): | YES  NO |  |  |
| 1. The candidate uses plain English when explaining information to the client. | YES  NO |  |  |
| 1. The candidate takes time to define terms or concepts that are unfamiliar to the client. | YES  NO |  |  |
| 1. The candidate speaks slowly. | YES  NO |  |  |
| 1. The candidate speaks using a well-modulated voice. | YES  NO |  |  |
| 1. The candidate provides a printed copy or hard copy of the service information discussed to the client, e.g., brochures or pamphlets. | YES  NO |  |  |
| 1. The candidate demonstrates effective communication throughout their discussion with the client. |  |  |  |
| 1. The candidate uses active listening, including: |  |  |  |
| * 1. Paraphrasing | YES  NO |  |  |
| * 1. Summarising | YES  NO |  |  |
| * 1. Using verbal affirmations such as ‘I understand,’ ‘Alright,’ ‘Got it.’ | YES  NO |  |  |
| 1. The candidate uses effective questioning, including: |  |  |  |
| * 1. Asking yes-no questions | YES  NO |  |  |
| * 1. Asking probing questions | YES  NO |  |  |
| 1. The candidate uses appropriate non-verbal communication to demonstrate respect. |  |  |  |
| 1. The candidate maintains appropriate eye contact with the client | YES  NO |  |  |
| 1. The candidate maintains proper posture (avoiding slouching) | YES  NO |  |  |
| 1. The candidate follows the workplace’s dress code | YES  NO |  |  |
| 1. The candidate occasionally nods to acknowledge what the client is saying. | YES  NO |  |  |
| 1. The candidate addresses the client’s requests appropriately.   The assessor to specify the request made by the client: |  |  |  |
| 1. The candidate takes note of the client’s request. | YES  NO |  |  |
| 1. The candidate reiterates the request and confirms with the client if they have understood it correctly. | YES  NO |  |  |
| 1. The candidate responds appropriately to the request.   The assessor to specify the response given.  (For a satisfactory performance, there must be at least one ticked)  Answering a service-related enquiry or question  Clarifying or repeating points discussed earlier.  Advising the client that they will get back to them on the request after they have gathered more information.  Providing additional information about the service not covered in the discussion.  Forwarding the request or concern to the appropriate person, e.g., the supervisor, as required in the organisation’s policies and procedures  Others (please specify): | YES  NO |  |  |
| 1. The candidate confirms with the client if they have understood the information discussed. |  |  |  |
| 1. The candidate takes pauses to check if the client has understood the information so far. | YES  NO |  |  |
| 1. The candidate asks the client if the information discussed is clear. | YES  NO |  |  |
| 1. The candidate asks the client if they have any concerns or questions. | YES  NO |  |  |
| 1. The candidate encourages the client to provide feedback. | YES  NO |  |  |
| 1. The candidate uses workplace/industry terminologies correctly and accurately throughout the meeting.   The assessor to list below terminologies the candidate used correctly and accurately.  (For a satisfactory performance, there must be at least two terminologies listed here) | YES  NO |  |  |

|  |  |
| --- | --- |
| **Assessor Declaration**  By signing here, I confirm that I have observed the candidate whose name appears above address service-related enquiries and requests from a customer/client.  I confirm that the information recorded on this *Observation Form* is true and accurately reflects the candidate’s performance during their completion of the workplace task. | |
| Assessor’s signature |  |
| Assessor’s name |  |
| Date signed |  |

End of Workplace Assessment – Observation Form