QCTO SKILLS PROGRAMME DOCUMENT

IN LINE WITH OQSF POLICY (2021) OCCUPATIONAL QUALIFICATION TYPE (NOMENCLATURE)

256 Glyn Street, Hatfield, Pretoria, 0083
Private Bag X278, Pretoria, 0001
+27 12 003 1800

www.qcto.org.za

QUALIFICATION /PART-QUALIFICATION /SKILLS PROGRAMME	TYPE (NOMENCLATURE)	TITLE (DESCRIPTOR)	NQF LEVEL	CREDITS
Skills Programme	Skills Programme	Cash Office Clerk	3	30

CURRICULUM CODE	411102-000-01-00 (SP241106)			

PARTNER DETAILS	ORGANISATION NAME	WEBSITE ADDRESS	TELEPHONE NUMBER	LOGO
QUALITY PARTNER - DEVELOPMENT	W&RSETA	www.wrseta.org.za	(012) 622-9500	W&RSETA
QUALITY PARTNER – ASSESSMENT (NOT APPLICABLE TO SKILLS PROGRAMME)	W&RSETA	www.wrseta.org.za	(012) 622-9500	W&RSETA

NB: - QUAL ID AND LIFE SPAN FOR QUALIFICATION(S)/PART-QUALIFICATION(S) TO BE COMPLETED BY SAQA
- SKILLS PROGRAMME ID AND LIFE SPAN TO BE COMPLETED BY QCTO

DESIGNATION	NAME AND SURNAME	SIGNATURE	DATE
SUBJECT MATTER EXPERT (SME)	Yolandi Booyens		
QUALITY PARTNER REPRESENTATIVE	Aphia Serumula		

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1. QUALIFICATION/PART-QUALIFICATION/SKILLS PROGRAMME DETAILS

Add additional space/table lines as is required

1.1 Sub-Framework: Occupational Qualifications Sub-Framework

OQSF

1.2 Type (Nomenclature):

1.2.1 Specify if this is a Qualification/Part-Qualification/Skills Programme

NB: Credit value of more than 120 and above is a Qualification.

Credit value of less than 120 credits is a Part-Qualification

Skills Programme 8 – 60 credits

Skills Programme

1.2.2 Type: (Nomenclature) e.g. Advanced Occupational Certificate)

NB: For Part-Qualification use Occupational Certificate as Qualification Nomenclature

Skills Programmes use Skills Programme, as nomenclature.

Skills Programme

1.3 Title Descriptor:

State the Occupation, Specialisation, context or Skills Programme context

Cash Office Clerk

1.4 NQF Level:

3

1.5 Credits:

30

1.6. Organising Field and Sub-field:

NB: Not Applicable to Skills Programmes

1.6.1 Organising Field:

Field 11 - Services

1.6.2 Organising Sub-Field:

Wholesale and Retail

1.7 QCTO Curriculum Code:

411102-01-01-01 (SP241106)

1.8 Originator/Quality Partner (QP) – Development/Assessment

1.8.1 Quality Partner (Qualifications Development):

W&RSETA

1.8.2 Quality Partner (Assessment):

NB: Not Applicable to Skills Programmes

W&RSETA

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1.9 Replacement

For the Replacement of Registered Occupational/Historical Qualifications/Unit Standards (US) and/or Learning Programmes (LP)/ QCTO/SETA Approved Skills Programmes, list details below:

This qualification replaces:

SAQA QUAL/US/LP ID OR QCTO/SETA APPROVAL ID	QUALIFICATION TITLE	Pre-2009 NQF Level	CURRICULUM CODE *(if Occupational)*	NQF LEVEL	MIN. CREDITS
N/A					

If there are no qualifications or learning programmes that must be replaced, then state that this qualification does not replace any other qualification, and no other qualification replaces it.

2. RATIONALE

2.1 The need for the Qualification, Part-Qualifications/Skills Programmes

The role of the Cash Office Clerk, in the Wholesale and Retail sector, is critical to the functioning of a wholesale and retail outlet. This position influences the flow of all the relevant back office processes in a wholesale or retail environment. Feedback from the Wholesale and Retail sector have identified the position of Cash Office Clerk to be a scarce skill.

2.2 Similar Qualification(s), Part-Qualifications/Skills Programmes

List similar Qualification(s), Part-Qualifications/Skills Programmes, already NQF registered/ QCTO approved:

N/A

2.3 Benefit to the sector, society and the economy:

This Skills Programme will not only impact on the learners who complete it, but will also impact on society and the economy. Wholesale and retail businesses will be able to function more effectively with trained staff members who have the knowledge, skills and work experience to operate productively and effectively, that meets business requirements and reduces losses due to negligence. Businesses will further benefit with trained people in a manner that promotes service excellence.

2.4 Typical learners:

Currently employed cash office clerks, the unemployed, marginalised youth, people with disabilities and women, semi-skilled workers seeking advancement, career changers, women returning to the workforce, individuals from rural or underserviced areas, informal sector, people with limited educational qualifications, potential small business owners.

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2.5 Relation to Occupation(s) and/or Profession(s)

2.5.1 Occupation(s) related:

2.5.1.1 Collaboration with relevant stakeholders:

Finance Manager, Store/Branch Manager, Cashier Supervisor, Accounts Payable Clerk, Accounts Receivable Clerk, Banking Officer, Auditor, Internal Controls Specialist, Retail Operations Manager, Compliance Officer, Bookkeeper, Payroll Manager, Inventory Control Specialist, Risk Management Officer.

2.5.1.2 List typical occupations in which the qualifying learner will operate (if relevant)

Cashier Supervisor, Accounts Clerk, Reconciliation Clerk, Accounts Payable Clerk, Accounts Receivable Clerk, Bookkeeper, Finance Clerk, Cash Vault Teller, Retail Cash Controller, Auditing Clerk, Revenue Clerk, Cash Management Associate, Payroll Clerk.

2.5.2 Profession(s) related:

2.5.2.1 Collaboration with relevant stakeholders:

Finance, Retail Management, Banking, Auditing, Accounting, Compliance, Internal Controls, Human Resources Management, Inventory Control, Risk Management, Customer Service, Cash Management, Operations Management, Debtors Clerk.

2.5.2.2 List typical professions in which the qualifying learner will operate (if relevant)

Finance, Retail Management, Banking, Auditing, Accounting, Compliance, Human Resource Administration, Inventory Management, Risk Management, Cash Handling, Operations Management, Financial Control.

3. PURPOSE

3.1 Benefit the learners:

The Cash Office Clerk Skills Programme benefits learners by providing them with the opportunity to formalise their already achieved competence or attaining the required new competence. During the skills programme learners will be exposed to data-driven decision-making to a limited extent, primarily in areas related to daily financial operations and reporting, loss control processes and procedures, compliance and risk mitigation.

3.2 What the qualification or part-qualification intends to achieve:

i.e. what the qualifying learner will know, do and understand after achievement;

The Skills Programme will serve to equip qualifying learners with the fundamental knowledge, skills and attitude necessary to:

- Cash up and consolidate multiple tills (Point-of-Sale) (PoS)
- Deposit takings in a retail environment
- Control cash (float), change and petty cash

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3.3 Typical Graduate attributes

1. Analytical mindset
2. Attention to detail
3. Problem-Solving skills
4. Process-orientated thinking
5. Communication and interpersonal skills
6. Technological proficiency
7. Adaptability
8. Time management
9. Ethical and compliance awareness
10. Continuous improvement focus

4. ENTRY REQUIREMENTS

Numeracy skills NQF level 1

5. RECOGNITION OF PRIOR LEARNING (RPL)

5.1 RPL for Access to Training:

NB: QCTO Standard Statement

Learners may use the RPL process to gain access to training opportunities for a programme of learning, qualification, part-qualification or skills programme if they do not meet the formal, minimum entry requirements for admission. RPL assessment provides an alternative access route into a programme of learning, qualification, part-qualification, or skills programme.

Such an RPL assessment may be developed, moderated and conducted by the accredited Skills Development Provider which offers that specific qualification/part qualification/skills programme. Such an assessment must ensure that the learner is able to display the equivalent level of competencies required for access, based on the NQF level descriptors.

5.2 RPL for Access to the External Integrated Summative Assessment (EISA):

NB: QCTO Standard Statement

For a Skills Programme, the accredited Skills Development Provider (SDP) must ensure all modular competency requirements are met prior to the FISA and keep record of such evidence.

Upon successful completion of the EISA/FISA, RPL learners will be issued with the QCTO certificate for the qualification, part-qualification or skills programme. Quality Partners are responsible for ensuring the RPL mechanism and process for qualifications and part-qualification is approved by the QCTO.

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6. RULES OF COMBINATION

6.1 Components:

KNOWLEDGE/THEORY COMPONENT

NB: MODE OF DELIVERY e.g. face to face/contact, online, e-learning, mobile training unit, blended, distance, etc.

State compulsory modules:

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
411102-000-01-KM-01	Concepts of cashing up	2	2	Face to face, online, blended
411102-000-01-KM-02	Principles of cashing up	2	2	Face to face, online, blended
411102-000-01-KM-03	Principles of consolidating daily takings	2	2	Face to face, online, blended
411102-000-01-KM-04	Principles of banking	2	2	Face to face, online, blended
411102-000-01-KM-05	Principles and concepts of change, cash (float) and petty cash control	2	2	Face to face, online, blended

Total credits of the selected modules = 10

State if combinations of modules are required. Include selection criteria:

NB: The number of categories is not prescribed e.g. (select two from Category A; select two from Category B etc.):

Category A

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY

Total credits of the selected modules =

Category B

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY

Total credits of the selected modules =

APPLICATION COMPONENT

NB: MODE OF DELIVERY e.g. face to face/contact, online, e-learning, mobile training unit, blended, distance, etc.

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- *For Qualifications, the Application Component includes compulsory Practical Skills Modules and Work Experience/Work Based Learning Modules.*
- *For Part-Qualifications, the Applications Component includes Practical Skills Modules and/or Work Experience/Work Based Learning Modules.*
- *For Skills Programmes, the Application Component includes Practical Skills Modules.*

APPLICATION SKILLS MODULE(S)

NB: MODE OF DELIVERY e.g. face to face/contact, online, e-learning, mobile training unit, blended, distance, etc.

State compulsory modules:

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY
411102-000-01-PM-01	Balance tills and record takings	2	6	Face to face, Online
411102-000-01-PM-02	Calculate the store takings	2	6	Face to face, Online
411102-000-01-PM-03	Deposit the day's takings	2	6	Face to face, Online
411102-000-01-PM-04	Control change, cash (float) and petty cash	2	2	Face to face, Online

State if combinations of modules are required. Include selection criteria:

NB: The number of categories is not prescribed e.g. (select two from Category A; select two from Category B etc.):

Category A

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY

Total credits of the selected modules = 20

Category B

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY

Total credits of the selected modules =

WORK EXPERIENCE MODULES

NB: MODE OF DELIVERY e.g. face to face/contact, online, e-learning, mobile training unit, blended, distance, etc.

State compulsory modules:

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY

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State if combinations of modules are required. Include selection criteria:

NB: The number of categories is not prescribed e.g. (select two from Category A; select two from Category B etc.):

Category A

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY

Total credits of the selected modules =

Category B

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY

Total credits of the selected modules =

State compulsory modules:

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY

State if combinations of modules are required. Include selection criteria:

NB: The number of categories is not prescribed e.g. (select two from Category A; select two from Category B etc.):

Category A

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY

Total credits of the selected modules =

Category B

MODULE CODE	MODULE TITLE	NQF LEVEL	CREDITS	MODE OF DELIVERY

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Total credits of the selected modules =

6.2 Soft Skills Included:

Indicate if 5% -10% of soft skills is included and give location notes on the modules where this is found:

3 credits value/ 10% of soft skill(s) is/are included in 411102-001-01-KM-03: Principles of consolidating daily takings, 411102-001-01-KM-05: Principles and concepts of change, float and petty cash control

6.3. Foundational Learning:

Indicate if foundational learning and give location notes on the modules where this is found:

N/A

7. EXIT LEVEL OUTCOMES (ELO) AND ASSOCIATED ASSESSMENT CRITERIA (AAC)

7.1 Exit Level Outcomes (ELO) 1:

Accurately consolidate sales data from multiple tills in accordance with organisational procedures.

Associated Assessment Criteria (AAC) for ELO 1:

- The importance of gathering and verifying sales data from various tills is discussed.
- All transactions, cash, and payment records are accurately recorded.
- Any discrepancies are identified and rectified.

7.2 Exit Level Outcomes (ELO) 2:

Cash up and reconcile the total cash across multiple tills

Associated Assessment Criteria (AAC) for ELO 2:

- The relevance of accurately counting and balancing total cash across all tills is explained.
- The importance of aligning cash totals with recorded sales and transaction details, is discussed.
- The significance of addressing any overages or shortages is outlined.
- All financial records are accurately documented for further processing.

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7.3 Exit Level Outcomes (ELO) 3:

Accurately prepare and secure takings for deposit in line with company procedures.

Associated Assessment Criteria (AAC) for ELO 3:

- Correctly counting and verifying the takings from the retail environment are explained.
- All cash, cheques, and other forms of payment are accurately recorded.
- Outlines are provided for packaging all cash and other forms of payment in preparation for bank deposits.
- Guidelines are given for packaging all cash and other forms of payment in preparation for cash-in-transit deposits.

7.4 Exit Level Outcomes (ELO) 4:

Deposit takings into the designated financial institution, maintaining full compliance with security protocols and organisational policies.

Associated Assessment Criteria (AAC) for ELO 4:

- All required documentation for the deposit are accurately completed.
- The procedure for depositing the taking at the correct financial institution, is discussed.
- Proof of deposit is obtained.

7.5 Exit Level Outcomes (ELO) 5:

Monitor and maintain accurate cash (float) and the change levels.

Associated Assessment Criteria (AAC) for ELO 5:

- The importance of executing regular checks to ensure that the cash (float) and the change at the tills are at the required level, is discussed.
- The procedure for replenishing or adjusting cash (float) and the change at the tills, as necessary, is outlined.
- All changes are recorded accurately to maintain proper financial control and prevent discrepancies.

7.6 Exit Level Outcomes (ELO) 6:

Manage and reconcile petty cash, comply with organisational cash management procedures.

Associated Assessment Criteria (AAC) for ELO 6:

- The tracking and recording of petty cash transactions, are described.
- All expenditure is documented.
- The importance of keeping receipts, is explained.

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- Reconciling the petty cash balance to maintain accurate financial records, is discussed.

8. INTEGRATED ASSESSMENT

8.1 Formative Assessments conducted internally

NB: QCTO standard statements

The skills development provider will use the curriculum to guide them on the stipulated internal assessment criteria and weighting. They will also apply the scope of practical skills and applied knowledge as stipulated by the internal assessment criteria. This formative assessment leads to entrance into the integrated external summative assessment.

8.2 Integrated Summative Assessments conducted Internally

NB: QCTO standard statements

An external integrated summative assessment, conducted through the relevant QCTO Assessment Quality Partner is required for the issuing of this qualification. The external integrated summative assessment will focus on the exit level outcomes and associated assessment criteria.

8.3 De-centralised Final Integrated Supervised Assessment (FISA) for Skills Programmes

NB: QCTO standard statements provided

- The FISA is de-centralised, and the assessment standards set by the QCTO must be implemented by the accredited SDP in the development, moderation, and implementation of all FISA for Skills Programmes.
- The accredited SDP manages and conducts the FISA and submits learner results for QCTO approval for certification, according to QCTO required compliance standards.
- For entrance into the FISA, the learner must have completed the Skills Programme successfully and be found competent in all modules, recorded internally by the SDP.

Continuous Assessment

- The SDP must ensure that all learners are enrolled with the QCTO at the start of training (within 5 days) in the format required by the QCTO.
- Continuous assessments are set by the SDP in accordance with the outcomes provided.
- This may consist of a variety of methods, e.g. practical or written assessments, assignments, projects, demonstrations, presentations, or any other form of assessment to assist the learner in the learning process.

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- During training, it is mandatory for formal summative assessments to take place at the end of each module/topic. These results must be formally recorded and be available for monitoring and/or evaluation by the QCTO.

Final Integrated Supervised Assessment (FISA)

All learners gain entrance to the Final Integrated Supervised Assessment by successfully completing all formal summative assessments conducted by the SDP.

Format of FISA:

A **final written assessment** integrating the relevant Exit Level Outcomes.

- All FISAs must be supervised, and virtual FISAs must be recorded throughout the assessment.

- All Exit Level Outcomes must be covered in the FISA. In the FISA, the learner must demonstrate applied knowledge and skills to prove that the competencies of the Skills Programme have been achieved.

- The FISA may not contain any assessments used in the "Continuous Assessment" process (thus no re-assessment/replications of formative assessment tools).

- Note that a different instrument must be developed and moderated for each FISA according to the standards below.

- Special considerations/concessions should be made for candidates with special learning needs.

Standards for Final Integrated Supervised Assessment (FISA):

The **WRITTEN FISA INSTRUMENT** must be developed and moderated by the SDP and conducted in a supervised environment. It is assessed by means of an **INSTRUMENT** and a **MEMORANDUM** developed by the SDP for this purpose.

In the **Written Component**, learners must be given *scenarios/case studies/briefs/questionnaire, (including multiple-choice questions, constructed responses, extended constructed responses, column answers, true or false, checklist, and such),* in which they must demonstrate that they have applied knowledge for all the Exit Level Outcomes and the purpose of the Skills Programme in the following aspects of the curriculum:

What Specifically must be achieved:

Candidates must competently:

1. **Cash Handling and Reconciliation**

   Given a scenario/case study/brief/questionnaire on accurately managing and reconciling cash, ensuring proper recording and reporting of transactions, the candidates convey insight to the following:

   - Cash (float) issuing and sign-off process.

   - Receiving and recording cash from multiple tills (Point-of Sales (PoS)).

   - Balancing the tills and cash (float).

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- Identifying and resolving discrepancies.
- Preparing cash deposits and banking.
- Maintaining accurate financial records.
- Security and fraud prevention procedures.

2. Customer Service and Communication

Given a scenario/case study/brief/questionnaire on providing professional and clear communication, addressing inquiries and resolving issues effectively, the candidate needs to demonstrate insight into:

- Understanding effective communication.
- Verbal and non-verbal communication skills.
- Active listening and responding to queries and complaints.
- Engaging in an ethical and professional manner.

3. Adherence to Security and Fraud Prevention

Given a scenario/case study/brief/questionnaire on ensuring the safety of cash, identifying and preventing fraud, and following security protocols, the candidate needs to convey insight to the following:

- Fraudulent activity.
- Security elements relating to banking activities.
- Verification of transactions and payments.
- Discrepancies and corrective actions.
- Validity of transactions requiring authorisation.

4. Cash Flow Management

Given a scenario/case study/brief/questionnaire on monitoring and managing cash flow, ensuring smooth operation and financial integrity, the candidate need to show understanding of:

- Monitoring and interpreting daily cash flow through pick-ups/uplifts.
- Recording cash transactions accurately.
- Reconciliation of cash movements and balances.
- Identifying cash flow variances and discrepancies.
- Reporting cash flow status and trends.

5. Compliance and Financial Reporting

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Given a scenario/case study/brief/questionnaire of adhering to regulatory standards and generating accurate financial reports, including cash reconciliations and bank deposits, the candidates convey insight to the following:

- Regulatory and compliance requirements.
- Accuracy and confidentiality in financial record-keeping.
- Reporting discrepancies and non-compliance issues.

Please take note of the following:

Candidates must be provided with clear guidelines and instructions on how to complete the assessment tasks, including the assessment criteria and expected outcomes and the following:

- Standardised forms for recording client information, such as intake forms, contracts, and authorisation forms.
- Templates for preparing documents related to funeral arrangements, such as service programs, obituaries, and invoices.
- Worksheets or checklists for conducting assessments, evaluations, or risk assessments in the cash office setting.

The conditions and requirements for the candidate to perform the assessment, e.g. problem statements, templates, a scenario, as well as clear instructions for various questions, must be provided to the candidate indicating the required evidence or performance expected.

To respond to challenges/issues/problems in the scenarios above:

a. The assessment should be a maximum of 3 hours.
b. The pass mark is 50% for the FISA.
c. No FISA instrument is allowed to be used verbatim for re-assessment or for a different cohort of learners.

- A computer-based assessment may be administered so that the above evidence can be created using document processing applications such as MSWord, MSExcel etc.
- Learners who complete this skills programme will accumulate credits towards the relevant full or part qualification. The Credit Accumulation and Transfer (CAT) Policy may apply to these learners.
- The candidate should be able to respond to a scenario/case study/brief within the specified time limit.
- The FISA is scored by a panel of assessors using a rubric to declare the candidate Competent or Not Yet Competent. Required improvement areas must be indicated.

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Submission of final results:

Final results must be submitted to the QCTO in the required format, within 21 days of the date of the FISA, together with the following:

- Completed QA Verification Report on the FISA (QCTO template: relevant sections).
- A copy of the final Assessment Instrument used, as well as the marking guideline / rubric.

9. INTERNATIONAL COMPARABILITY

NB: Not Applicable to Skills Programmes

N/A

9.1 Introductory Statement

9.2 Detailed Outline

9.3 Concluding Statement

10. ARTICULATION

10.1 Articulation for Qualifications and Part- Qualifications

NB: QCTO standard statements for options are provided and require qualification details to be inserted

10.1.1 Horizontal Articulation: This qualification articulates horizontally within the OQSF and between other sub-framework(s) as follows:

N/A

10.1.2 Vertical Articulation: This qualification articulates vertically within the OQSF as follows:

N/A

10.1.3 Diagonal Articulation: This qualification articulates diagonally across NQF levels and across Sub-Frameworks:

N/A

10.1.4 Validation of Entry Requirements into articulation possibilities provided:

NB: If the entry requirements make articulation possible, answer YES.

N/A

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10.2 Articulation for Skills programmes

10.2.1 Work Opportunities:

Retail Cash Office Clerk, Bank Teller, Accounts Receivable Clerk, Accounts Payable Clerk, Cash Management Associate, Bookkeeper, Financial Clerk, Reconciliation Clerk, Treasury Assistant, Payroll Clerk, Auditing Clerk, Cash Vault Teller, Revenue Clerk, Customer Service Representative (Cash Handling), and Finance Assistant.

10.2.2 Learning Opportunities:

Once a person has achieved the Cash Office Clerk Skills Programme Certificate, there are several further learning opportunities available to them to pursue further, including:

Financial Management Courses, Cash Handling and Reconciliation Training, Customer Service Skills Workshops, Accounting Software Training, Compliance and Regulatory Training, Data Analysis Courses, Time Management and Organisational Skills Workshops, Process Improvement and Lean Management Training, Excel and Spreadsheet Training, Professional Certifications (e.g., Certified Bookkeeper, Certified Payroll Professional).

11. NOTES

11.1 Additional Legal or Physical Entry Requirements

None

11.2 Criteria for Accreditation

Accreditation requirements, against which Skills Development Providers (SDP) and Assessment Centres, will be accredited, is found in the Curriculum Document, as listed below.

Curriculum Code:

421102-001-01-01 (241106)

11.3 Encompassed Trades (where applicable)

This Skills Programme is not a trade.

12. ASSOCIATED QUALIFICATION(S)/PART-QUALIFICATION(S):

SAQA QUAL ID	QUALIFICATION TYPE	QUALIFICATION DESCRIPTOR	CURRICULUM CODE	NQF LEVEL	CREDITS
None					

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