Australian Government

Department of Education, Employment and Workplace Relations

FNSSUP505A Produce reports for superannuation

Revision Number: 1

INDUSTRY SKILLS COUNCILS
Creating Australia's Future

FNSSUP505A Produce reports for superannuation

Modification History

Not applicable.

Unit Descriptor

Unit descriptor	This unit describes the performance outcomes, skills and knowledge required to analyse report requirements, design reports, research report content and produce reports for the purpose of administering superannuation services.
	This unit is applicable to individuals working within enterprises and job roles subject to licensing, legislative, regulatory or certification requirements including legislation administered by the Australian Securities and Investment Commission (ASIC).

Application of the Unit

Application of the unit	This unit applies to job roles involving reporting requirements for the superannuation sector.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Prerequisite units		

Innovation and Business Skills Australia

Employability Skills Information

Employability skills	This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1. Analyse report requirements	1.1. Organisation and task requirements are identified prior to document design and research
	1.2. Scope of report and relevant audience is confirmed
	1.3. Resources, *software*, *ergonomic* and research requirements are identified and accessed
2. Design report	2.1. *Report structure and layout* are designed to suit the purpose, audience and information requirements of the task
	2.2. Report is designed to enhance readability and appearance and meet *organisation and task requirements* for *style and layout*
	2.3. Complex software functions are used to enable efficient manipulation of information and other material and ensure *consistency of design and layout*
3. Research report content	3.1. Research is conducted to gain information for report content including development of financial and statistical details as required
	3.2. Report content is developed in accordance with organisation and compliance requirements
	3.3. Evidence is gathered to support recommendations and conclusions to be included in the report
4. Produce report	4.1. Report is written using appropriate language and contains information required to meet report objectives
	4.2. The report is coherent and logical and any recommendations/suggestions made are based on documented analysis or research undertaken
	4.3. Software operations used in development of documents achieve required results
	4.4. *Conservation techniques* are engaged
	4.5. Documents are edited and printed in accordance with organisation and task requirements
	4.6. Documents are *named and stored* in accordance with organisation requirements and the application exited without information loss/damage
	4.7. Documents are prepared within designated timelines and organisation requirements for speed and accuracy

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

Required skills

- well-developed communication skills to:
    - liaise with others, share information, confirm work requirements, using questioning and active listening as required
    - use language and concepts appropriate to cultural differences
    - to follow complex oral instructions
    - relate to people from a range of social, cultural and ethnic backgrounds
- data analysis and interpretation skills
- numeracy and IT skills for:
    - making and checking financial calculations
    - accessing and using appropriate software such as word processors, desktop publishing, spreadsheets and databases
    - using internet information
- interpersonal skills to relate effectively within a team environment
- organisation skills, including the ability to plan and sequence work
- highly developed literacy skills to read, write, edit and proofread documents to ensure clarity of meaning, accuracy and consistency of information proofreading and editing skills to ensure clarity of meaning
- problem solving skills to use processes flexibly and interchangeably
- learning skills to maintain knowledge of changes to products and relevant legislation
- judgement skills for forming recommendations in operational situations
- management skills for working effectively in a constantly changing environment

Required knowledge

- legislation relevant to documentation within the superannuation industry
- advanced functions of word processing and/or desktop publishing software applications
- impact of formatting and design on the presentation and readability of documents
- organisation policies and procedures for written communications

Evidence Guide

EVIDENCE GUIDE	
The Evidence Guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.	
Overview of assessment	
Critical aspects for assessment and evidence required to demonstrate competency in this unit	Evidence of the ability to: • analyse report requirements and design a report • research report content requirements to produce a clear and accurate report • apply ergonomic and conservation principles in the workplace.
Context of and specific resources for assessment	Assessment must ensure: • competency is demonstrated in the context of the work environment and conditions specified in the range statement either in a relevant workplace or a closely simulated work environment • access to and the use of a range of common office equipment, technology, software and consumables • access to organisation financial records • access to organisation policies and procedures.
Method of assessment	A range of assessment methods should be used to assess practical skills and knowledge. The following examples, in combination, are appropriate for this unit: • evaluating an integrated activity, which combines the elements of competency for the unit, or a cluster of related units of competency • observing processes and procedures in workplaces • verbal or written questioning on underpinning knowledge and skills • evaluating samples of work • accessing and validating third party reports • setting and reviewing workplace business simulations or scenarios.
Guidance information for assessment	

Range Statement

RANGE STATEMENT	
The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.	
Software may include:	• desktop publishing • word processing.
Ergonomic requirements may include:	• avoiding radiation from computer screens • chair height, seat and back adjustment • document holder • footrest • keyboard and mouse position • lighting • noise minimisation • posture • screen position • work station height and layout.
Report structure and layout may include:	• captions • concordance files • different odd and even pages • document protection • drawing • forms with fields • hyperlinks • linked and/or embedded objects • long documents • mail merge data documents • master documents • multiple headers and footers • multiple sections • multiple users • primary mail merge documents • sub-documents • templates • WordArt.
Organisation and task requirements may	• author's instructions • company colour scheme

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include:	• company logo • consistent corporate image • content restrictions • established guidelines and procedures for document production • house styles • log-on procedures • observing copyright legislation • organisation name, time, date, document title, filename, etc. in header/footer • password protection • standard formats • storage/location of data • templates • use of templates.
Style and layout may include:	• boxes • colour • columns • drawing • graphics • headings • letter and memo conventions • page layout • photographs • typeface • white space.
Consistency of design and layout may include:	• annotated references • borders • bullet/number lists • captions • consistency with other business documents • footnotes/endnotes • indentations • page numbers • spacings • typeface styles and point size.
Conservation techniques may include:	• double-sided paper use • recycling used and shredded paper • reused paper for rough drafts (observing confidentiality requirements)

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	• utilising power-save options for equipment.
Naming and storage of documents may include:	• authorised access • file names according to organisation procedure (e.g. numbers rather than names) • file names which are easily identifiable in relation to the content • file/directory names which identify the operator, author, section, date, etc. • filing locations • organisation policy for backing up files • organisation policy for filing hard copies of documents • security • storage in folders/sub-folders • storage on various types of digital media.

Unit Sector(s)

Unit sector	Superannuation

Competency field

Competency field	

Co-requisite units

Co-requisite units		