

Administration Training Package BSA97
Administration Competency Standards
Level 1
(Enhanced)

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BSAINF101B Handle mail to facilitate communication

This Unit covers receiving and distributing incoming mail and collecting and despatching outgoing mail *within enterprise timelines*.

This unit can be assessed alone or in combination with other units making up a job role.

Element of Competency	Performance Criteria
Receive and distribute incoming mail	<ul style="list-style-type: none">• Incoming mail is checked and registered to ensure accuracy of <i>records</i>• Titles and locations of company personnel and departments are identified and understood• Urgent and confidential mail is identified and distributed to the addressee <i>promptly</i>• Mail is sorted and despatched to the <i>nominated person/location</i>• Damaged, suspicious or missing items are recorded and where necessary reported <i>promptly</i>
Receive and despatch outgoing mail	<ul style="list-style-type: none">• Outgoing mail is collected from <i>each section</i> of the enterprise, checked and sorted to ensure all items are <i>correctly prepared</i> for despatch• Outgoing mail is <i>processed correctly</i> for despatch• Mail is recorded in register• Mail is despatched to meet <i>designated timelines</i>
Collate and despatch documents for bulk mailing	<ul style="list-style-type: none">• Quantities/resources/time to complete bulk mailing of documents estimated correctly• Documents are collated <i>as required</i>• Envelopes are sorted and batched in accordance with Australia Post specifications• Numerical information is self-checked• Batched items are lodged for delivery

Range of Variables
Incoming mail may be: <ul style="list-style-type: none">• paper based• electronic (e.g. faxes, email)• internal• external• urgent• confidential• letters• journals• other correspondence
Checking mail may include: <ul style="list-style-type: none">• mail marked 'confidential', 'urgent' or 'personal'• mail sent via 'express post' or registered• mail that has been damaged• mail that looks suspicious• enclosures
Mail register may include: <ul style="list-style-type: none">• electronic (database)• paper based (mail book, form, file)
Ensuring accuracy of <i>records</i> may include checking: <ul style="list-style-type: none">• the date received• the sender• the addressee• the subject• assigning a file number• condition of mail item (damaged, no return address)
Prompt delivery of urgent and confidential mail may include: <ul style="list-style-type: none">• immediate, hand delivery• separating and prioritising urgent mail

Range of Variables
<p>Sorting mail may include:</p> <ul style="list-style-type: none">• separating urgent mail to be distributed first• sorting by departments• sorting by location• sorting by seniority of personnel• separating internal (organisational) mail and external mail• separating by order of importance for each individual• separating junk mail• sorting invoices, cheques and accounts
<p>Despatching mail to <i>nominated person/location</i> may include the:</p> <ul style="list-style-type: none">• department• individual addressee• administrative support person
<p>Damaged or suspicious mail may include:</p> <ul style="list-style-type: none">• mail exposed to the weather (water damage from rain)• mail roughly handled (broken contents, torn address labels)• pilfered mail (contents may be missing, parcels slit opened)• mail that looks unusual• mail that makes noises• mail that smells strange• mail that looks like it has been interfered with (re-sealed mail)
<p>Prompt action in relation to damaged, missing or suspicious items may include:</p> <ul style="list-style-type: none">• contacting the sender to ensure everything sent was received• negotiating the replacement of missing or damaged items with the sender• filling out forms for the sender's insurance company• not touching or moving suspicious mail• calling the supervisor or security staff immediately
<p>Collecting outgoing mail from each section may include:</p> <ul style="list-style-type: none">• collecting mail from a designated area in each department• collecting mail from one, central mail tray• collecting mail from individuals• receiving mail directly from individuals
<p>Correctly preparing mail items for despatch includes:</p> <ul style="list-style-type: none">• checking the address details and layout are correct• checking that address is not obscured• checking that the return address is included• determining the most appropriate carrier• ensuring the correct requirements for the chosen carrier are being followed

Range of Variables
<p>Correctly processing mail for despatch may include:</p> <ul style="list-style-type: none"> • calculating and paying for postage • registering mail
<p>Registering outgoing mail may include:</p> <ul style="list-style-type: none"> • the date of despatch • the sender • the sender's department • the addressee/organisation • the appropriate carrier (courier, normal mail, express post) • the reference number • receipts attached where appropriate
<p>Meeting <i>designated timelines</i> may include:</p> <ul style="list-style-type: none"> • payments for goods and services • contracts which require documents signed and sent urgently to close deal • official documents which must be lodged by a certain date to avoid fines (Australian Tax Office) • daily cut-off time when mail is taken to the post office • nominated carrier's cut off time
<p>Resources required for bulk mail-outs may include:</p> <ul style="list-style-type: none"> • time • photocopier • stationery (bulldog clips, staples and stapler, paper clips, envelopes, photocopying paper, brochures, pamphlets or other inserts) • human resources <ul style="list-style-type: none"> - internal (additional assistance) - external (mail handling centre)
<p>Collating documents as required may include:</p> <ul style="list-style-type: none"> • Internal procedures <ul style="list-style-type: none"> - address labels: either personal titles or to a common title such as to the Householder or Office Manager - ensuring the correct amount of enclosures are in place and in order • External procedures <ul style="list-style-type: none"> - meeting specific carrier requirements often relating to quantity, size, postcode, location weight or urgency of delivery

Range of Variables
<p>Numerical information may include:</p> <ul style="list-style-type: none">• the number of items being handled• the number of inserts included• weighing items• calculating cost according to weight• items batched correctly (by destination, number of items)

Evidence Guide

Critical aspects:

- *enterprise policies and procedures* are understood and followed
- incoming mail is collected according to *enterprise policies and procedures*
- incoming mail is checked and registered according to *enterprise policies and procedures*
- roles, titles and locations of enterprise personnel and departments are identified correctly and understood
- unopened mail is sorted correctly according to whether it is:
 - confidential or personal
 - urgent
 - damaged
 - suspicious
- urgent mail is identified and distributed to the addressee promptly
- confidential mail is not opened and is distributed to the addressee promptly
- damaged, suspicious or missing items are reported to *designated person* promptly, recorded and sender of damaged mail is contacted to check for missing contents
- mail is opened, sorted and checked for the correct number of enclosures if necessary
- opened mail is checked for a return address and if not included in mail, an envelope is attached
- contents of mail is kept in form and sequence in which it arrived
- mail is stamped with date of receipt (with the exception of some legal documents)
- circulation slip is attached if necessary
- mail is distributed and/or circulated to *appropriate personnel* within *designated timelines*
- appropriate method for despatch of outgoing mail is determined
- outgoing mail is sorted according to method of despatch
- address details on items for despatch are checked for accuracy and outgoing mail is recorded in outgoing mail register
- mail is despatched according to *enterprise policies and procedures* within *designated timelines*
- time and resources needed for bulk mailing are estimated correctly
- documents are collated and inserted into envelopes according to *enterprise policies and procedures*
- bulk mail items are sorted and batched according to Australia Post's specifications
- numerical information is accurate
- batched items are lodged for delivery according to *enterprise policies and procedures*
- urgent despatches are organised when necessary
- problems are clarified and assistance is sought when necessary

Resource implications:

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- workplace manuals and reference materials such as enterprise policy, procedural manuals, staff directories and organisational charts

Evidence Guide

Consistency in performance:

This unit of competency will require evidence to be collected across a range of events, dealing with different workplace matters and over a period of time to ensure that situational variables are achieved.

Context of assessment:

Evidence of competency can be met in different situations, including:

- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times)

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Underpinning knowledge and skills
Knowledge

- application of the *enterprise policies and procedures* required across the full range of tasks covered
- the roles and locations of a firm's personnel
- Australia Post's batching specifications

Skills

- literacy: follows routine *enterprise policies and procedures*; follows instructions, locates and matches routine everyday information for sorting purposes
- communication: listens for specific information; participates in informal conversations; clarifies when necessary using simple questioning techniques
- numeracy: records information; sorts mail according to agreed principles (numbers, company directory, destination),
- collating skills

Key Competencies						
Utilisation of the Key Competencies required in the performance of this unit						
Communicating ideas and information	Collecting, analysing and organising information	Planning and organising activities	Working with others in a team	Using mathematical ideas and techniques	Solving problems	Using technology
1	1	1	1	1	1	0

Performance levels:

Level 1

- carries out established processes
- makes judgements of quality using given criteria

Level 2

- manages processes
- selects the criteria for the evaluation process

Level 3

- establishes principles and processes
- evaluates and reshapes processes
- establishes criteria for evaluation of processes

BSAINF102B Handle information to maintain access to and security of records

This Unit covers handling files, records etc. so that documents can be found and accessed in accordance with *enterprise procedures and policies*.

This unit may be assessed alone or in combination with other units making up a job role.

Element of Competency	Performance Criteria
File documents	<ul style="list-style-type: none">• Documents are classified and sorted to maintain the integrity of the system• Classification uncertainties are referred to an <i>appropriate authority</i>• Documents are indexed and filed in the <i>correct location and sequence</i>
Identify and retrieve documents	<ul style="list-style-type: none">• Specified files/records are located within the <i>designated timelines</i>• Located files are extracted from system and despatched to the <i>nominated person</i>• <i>Security and confidentiality procedures</i> are followed

Range of Variables
<p>Documents may be grouped and sorted according to:</p> <ul style="list-style-type: none">• alphabetical order• numerical order• a keyword• geographical location or region• chronological• subject of document• cross-referencing to another document/file• a combination of the above methods
<p>An appropriate authority may refer to the:</p> <ul style="list-style-type: none">• supervisor (file manager, librarian, department or office manager)• staff member releasing the file for filing• user manual outlining the enterprise's specific procedures for filing
<p>Indexing files may include:</p> <ul style="list-style-type: none">• determining logical sequence of the document/file• indexing by subject• indexing by alphabetical order• indexing by numerical order
<p>Filing new documents may include:</p> <ul style="list-style-type: none">• classifying and sorting documents• checking the document is not damaged• fastening documents to be filed together securely (paper-clipped, stapled)• attaching relevant notes or instructions to the document securely• ensuring documents go into the filing system in their original condition
<p>Correct location and sequence may be determined by:</p> <ul style="list-style-type: none">• status of the file (confidential, closed, archive material, or used daily)• the subject area of the document• categorising the document further (alphabetical, numerical order)
<p>Designated timelines may include:</p> <ul style="list-style-type: none">• urgent deadlines (for a same day meeting, urgent request)• by the end of the day• by tomorrow• by next week

Range of Variables
<p><i>Nominated person may be:</i></p> <ul style="list-style-type: none">• internal (supervisor, another person within the department, a person outside the department but within the enterprise)• external (someone from within the enterprise requesting the information be sent to a person outside of the enterprise)
<p><i>Security and confidentiality procedures may relate to:</i></p> <ul style="list-style-type: none">• signed authorisation from the manager/supervisor• passwords for files stored electronically on the computer• files tagged to indicate security rating (general, personal, restricted, confidential, secret, top secret)• locking restricted access files in a secure location• monitoring of paper based files and documents removed from the filing system (using outcards, file markers, passing slips, a file register)

Evidence Guide**Critical aspects:**

- documents are sorted and classified appropriately
- uncertainties about classifications are referred to the *appropriate authority*
- documents are indexed according to *enterprise policies and procedures*
- documents to be filed are checked to ensure that:
 - documents are not damaged
 - documents to be filed together are paper clipped or stapled
 - attachments are secure or written on to the document
 - original condition is maintained
- document is filed in correct location and sequence to maintain integrity of the system
- document is retrieved according to *enterprise policies and procedures* and location of file is recorded
- documents are delivered to *nominated person* using appropriate delivery method (eg. internal mail, hand delivery, postal service, facsimile transmission etc.)
- security and confidentiality procedures are understood and followed, including:
 - signed authorisation to retrieve file is obtained if necessary
 - password is obtained if necessary
 - inappropriate information is not released to the public or competitors

Resource implications:

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- filing system
- workplace manuals and reference materials such as company policy, procedural manuals staff directories and organisational charts

Consistency in performance:

This unit of competency will require evidence to be collected across a range of events, eg. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

Evidence Guide

Context of assessment:

Evidence of competency can be met in different situations, including:

- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times).

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Underpinning knowledge and skills
Knowledge

- *enterprise policies and procedures* regarding filing system
- different types of records held by the enterprise and their location
- the nature of disclosable and non-disclosable information

Skills

- literacy: reads and follows *enterprise policies and procedures*; identifies specific information in routine documents
- communication: participates in informal conversations; clarifies when necessary using simple questioning techniques
- numeracy: records and sorts information according to agreed principles (numbers, company directory, destination)
- cross-checks with attention to detail

Key Competencies						
Utilisation of the Key Competencies required in the performance of this unit						
Communicating ideas and information	Collecting, analysing and organising information	Planning and organising activities	Working with others in a team	Using mathematical ideas and techniques	Solving problems	Using technology
1	1	1	1	1	1	*

Performance levels:

Level 1

- carries out established processes
- makes judgements of quality using given criteria

Level 2

- manages processes
- selects the criteria for the evaluation process

Level 3

- establishes principles and processes
- evaluates and reshapes processes
- establishes criteria for evaluation of processes

BSACOM101B Receive and pass on messages to facilitate communication flow

This Unit covers being able to receive and pass on written and verbal messages within enterprise timelines.

This unit can be assessed alone or in combination with other units making up a job role.

Element of Competency	Performance Criteria
Receive and relay oral messages	<ul style="list-style-type: none">• Message is understood and clarified, if necessary• Message is accurately recorded, if necessary• Message is accurately relayed to <i>nominated person</i> within <i>designated timelines</i>
Receive and relay written messages	<ul style="list-style-type: none">• Instructions for relaying written messages are understood, recorded and clarified, if necessary• Message received is understood and relayed to the <i>nominated person</i> within <i>designated timelines</i>

Range of Variables
<p>Understanding and clarifying the message may include:</p> <ul style="list-style-type: none"> • asking questions • clarifying details • repeating the message back to the caller
<p>Accurately recording the message may include:</p> <ul style="list-style-type: none"> • recording who the message is for • recording the caller's name, organisation, phone/fax number • recording the message in a clear and concise manner • recording the date and time of the message • initialling the message
<p>Accurately relaying the message may include:</p> <ul style="list-style-type: none"> • passing the message on in person (orally) • leaving the written message in the appropriate place, eg. on nominated person's/ secretary's message spike, desk • distributing message to in-trays, pigeon holes, desks, via e-mail
<p>The <i>nominated person</i> may include:</p> <ul style="list-style-type: none"> • addressee • the person specified by the caller • supervisor
<p>Within <i>designated timelines</i> may include:</p> <ul style="list-style-type: none"> • relaying the message to the appropriate person as soon possible • relaying the message within a certain time limit • relaying the message within the time stipulated by the person leaving the message
<p>Understanding the message received may include:</p> <ul style="list-style-type: none"> • listening actively • questioning • ensuring all details in the message are clear • contacting the person who forwarded the message to clarify details if information is unclear • confirming details
<p>Relaying the message to the <i>nominated person</i> may include:</p> <ul style="list-style-type: none"> • relaying the message directly to the intended recipient • distributing the written message on by placing it into the intended recipient's in-tray/pigeon hole, electronic mail box

Evidence Guide**Critical aspects:**

- enterprise policies and procedures are understood and followed
- listens actively to determine the other person's needs
- questions appropriately to ensure other person's message is understood
- message is recorded accurately, written clearly and relayed to *nominated person* within *designated timelines*
- if message is relayed orally, clear and appropriate language is used
- message type is identified and purpose of message is understood
- message is clarified with appropriate person if necessary
- message is relayed to nominated person within *designated timelines*
- any difficulties encountered are referred to *designated person* and assistance is sought promptly when needed

Resource implications:

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- workplace manuals and reference materials such as company policy, procedural manuals and checklists
- appropriate technology such as telephone equipment, computer software

Consistency in performance:

This unit of competency will require evidence to be collected across a range of events, eg. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

Evidence Guide**Underpinning knowledge and skills****Knowledge**

- application of the *enterprise policies and procedures* required in the full range of tasks covered
- telephone protocol
- *enterprise's* standard greetings
- telephone equipment and its functions
- nature of disclosable and non-disclosable information
- the roles and responsibilities of the *enterprise's* personnel/departments

Skills

- literacy: follows *enterprise procedures* for routine greeting; uses common opening and closing statements as directed; listens for specific information on routine correspondence as directed and clarifies when necessary using simple questioning techniques; completes documentation to record message, eg message pad; provides information about routine enterprise matter by answering routine enquiries or providing material already available
- communication: listens for specific information on routine enquiry; participates in informal conversations
- numeracy: records numbers accurately and sorts messages according to priority
- interpersonal skills and telephone etiquette

Key Competencies						
Utilisation of the Key Competencies required in the performance of this unit						
Communicating ideas and information	Collecting, analysing and organising information	Planning and organising activities	Working with others in a team	Using mathematical ideas and techniques	Solving problems	Using technology
1	1	1	1	1	1	1

Performance levels:

Level 1

- carries out established processes
- makes judgements of quality using given criteria

Level 2

- manages processes
- selects the criteria for the evaluation process

Level 3

- establishes principles and processes
- evaluates and reshapes processes
- establishes criteria for evaluation of processes

BSAENT101B Apply knowledge of enterprise to complete routine administrative tasks

This Unit covers demonstrating knowledge of enterprise's main business and the main function of each department/staff member. It also covers knowledge of the enterprise's format and procedures for documents.

This unit can be assessed alone or in combination with other units making up a job role.

Element of Competency	Performance Criteria
Identify key functions and personnel/departments	<ul style="list-style-type: none">• The <i>nominated title of the enterprise</i> is used for all office business dealings• The <i>key purpose/prime function</i> of the enterprise is identified upon request• The correct names of all the <i>key departments</i> are identified upon request• The <i>function(s) of all key departments</i> are identified upon request
Apply office procedures	<ul style="list-style-type: none">• Office procedures are adopted in relation to correct <i>documentation and format</i>• Irregularities and/or difficulties are referred to <i>designated person</i> for resolution

Range of Variables
<p><i>Nominated title of the enterprise may include:</i></p> <ul style="list-style-type: none">• acronym• full company name• trading name
<p><i>Key purpose/prime function of the enterprise may include:</i></p> <ul style="list-style-type: none">• sale of products/services• professional/membership organisation• manufacturing• retail sales• educational institution• publishing company
<p><i>Correct names of key departments may include:</i></p> <ul style="list-style-type: none">• accounts• financial• business support• sales• marketing• legal• research and development• customer service
<p><i>Functions of key departments may include:</i></p> <ul style="list-style-type: none">• processing invoices and managing accounts• setting budgets and preparing financial information• developing business proposals• selling products• developing marketing strategies• advising enterprise on legal responsibilities• developing new ideas and conducting research• assisting customers
<p><i>Correct documentation and format may include:</i></p> <ul style="list-style-type: none">• letterhead• house style• with compliments slips• catalogues, price lists• envelopes• display materials• presentation/information kits

Range of Variables**Understanding the application of office procedures may involve:**

- consulting the enterprise's induction kit or policies and procedures manual
- watching and listening to the way other staff perform office procedures
- asking the supervisor for advice

Designated person may include:

- supervisor
- finance manager
- accountant
- sales manager
- sales people
- administration manager
- receptionist
- personal assistant
- database officer
- marketing manager

Problems may include:

- being unable to respond to a request
- being unsure of the right information to give to the client
- being unsure of whether to disclose information

Evidence Guide**Critical aspects:**

- structure of enterprise and its *key functions* are identified and understood and can be communicated clearly to others
- inquiries within own area of responsibility are dealt with promptly and courteously according to *enterprise policies and procedures*
- details of enquiry are clarified if necessary
- correct documentation is used as appropriate
- requests outside own area of responsibility are referred to *appropriate person*
- problems and difficulties with handling requests are anticipated and appropriate responses are identified
- when dealing with clients a positive image of the enterprise is conveyed at all times
- any difficulties are reported to *designated person*

Resource implications:

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- workplace manuals and reference materials such as organisational chart and staff directory, company policy and procedural manuals
- relevant company information and promotional material
- telephone equipment
- examples of customer service charters

Consistency in performance:

This unit of competency will require evidence to be collected across a range of events, eg. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

Evidence Guide

Context of assessment:

Evidence of competency can be met in different situations, including:

- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times)

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Underpinning knowledge and skills
Knowledge

- structure and *key functions* of enterprise
- enterprise policies and procedures
- location of enterprise promotional material
- nature of non-disclosable information
- enterprise customer service policies and procedures
- enterprise telephone and face-to-face greetings protocol

Skills

- literacy: reads and understands *enterprise policies and procedures*; follows simple written and verbal instructions
- communication: listens for specific information on routine procedures as directed; participates in informal conversations; clarifies when necessary using simple questioning techniques and asks for assistance

Key Competencies						
Utilisation of the Key Competencies required in the performance of this unit						
Communicating ideas and information	Collecting, analysing and organising information	Planning and organising activities	Working with others in a team	Using mathematical ideas and techniques	Solving problems	Using technology
1	1	1	1	*	1	0

Performance levels:

Level 1

- carries out established processes
- makes judgements of quality using given criteria

Level 2

- manages processes
- selects the criteria for the evaluation process

Level 3

- establishes principles and processes
- evaluates and reshapes processes
- establishes criteria for evaluation of processes

BSATEC101B Operate a range of office equipment to complete routine tasks

This Unit covers selecting and using the correct office equipment (for example, computer, fax, telephone) to complete a task.

This unit can be assessed alone or in combination with other units making up a job role.

Element of Competency	Performance Criteria
Select and locate equipment to be used for the task(s)	<ul style="list-style-type: none">• Equipment selected is appropriate for the task to be undertaken• Equipment is located and checked for availability of use by operator
Operate equipment	<ul style="list-style-type: none">• Equipment is used in accordance with instructions• Equipment faults are identified• Equipment faults are reported to the <i>nominated person/section</i>• Shutdown procedures are followed, as appropriate

Range of Variables
<p>Appropriate equipment may include:</p> <ul style="list-style-type: none">• photocopier• computer• printer• binder• shredder• answering machine• fax machine• telephone• overhead projector• mail-handling equipment
<p>Locating equipment may include:</p> <ul style="list-style-type: none">• checking specified storage areas• checking previous equipment bookings• asking colleagues or supervisor
<p>Checking for availability may include:</p> <ul style="list-style-type: none">• checking priority access• checking equipment bookings• restrictions on level of usage
<p>Equipment instructions may include:</p> <ul style="list-style-type: none">• manufacturer's guidelines• procedures manual• training notes
<p>Equipment faults may include:</p> <ul style="list-style-type: none">• paper jam• low toner level• power surge on computer• breakdown of components• computer virus• frayed power cords• faulty switch• software application not responding• defaults set incorrectly

Range of Variables
<p><i>Nominated person/section may include:</i></p> <ul style="list-style-type: none">• direct supervisor• office manager• IT manager• maintenance department• external supplier
<p>Shutdown procedures may include:</p> <ul style="list-style-type: none">• exit all applications• checking which equipment needs to be switched off• switching off power at the mains• resetting, clearing functions selected

Evidence Guide**Critical aspects:**

- understanding of the various functions of office equipment is demonstrated
- appropriate equipment for the given task is located
- checks that equipment is available to use and lets others know if equipment is to be used for extended periods
- equipment is operated correctly in accordance with instructions
- equipment faults are identified
- equipment faults are reported to *nominated person/section*
- when shutting down equipment appropriate shutdown procedures are followed

Resource implications:

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- a range of office equipment
- workplace manuals and reference materials such as equipment user manuals, company policy, procedural manuals

Consistency in performance:

This unit of competency will require evidence to be collected across a range of events, eg. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

Context of assessment:

Evidence of competency can be met in different situations, including:

- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times)

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Evidence Guide**Underpinning knowledge and skills****Knowledge**

- the functions of a range of office equipment
- the correct shutdown procedures for a range of office equipment
- recognises equipment faults and identifies those within scope of own responsibility
- application of *enterprise policies and procedures* across the full range of tasks required

Skills

- literacy: follows *enterprise procedures* for office equipment;
- communication: listens for specific information on routine procedures as directed and clarifies when necessary using simple questioning techniques; participates in informal conversations
- follows sequenced written and oral instructions
- identifies and uses, with supervisor's support, appropriate equipment to complete a task

Key Competencies						
Utilisation of the Key Competencies required in the performance of this unit						
Communicating ideas and information	Collecting, analysing and organising information	Planning and organising activities	Working with others in a team	Using mathematical ideas and techniques	Solving problems	Using technology
1	1	1	1	1	1	1

Performance levels:

Level 1

- carries out established processes
- makes judgements of quality using given criteria

Level 2

- manages processes
- selects the criteria for the evaluation process

Level 3

- establishes principles and processes
- evaluates and reshapes processes
- establishes criteria for evaluation of processes

BSATEC102B Access and retrieve computer data

This Unit covers using a keyboard to use standard software to open, edit, save and close a file

This unit can be assessed alone or in combination with other units making up a job role.

Element of Competency	Performance Criteria
Operate computer equipment	<ul style="list-style-type: none">• Computer is turned on in accordance with manufacturer's instructions• Log on procedures are followed where necessary• <i>Keyboard is operated within</i> designated speed and accuracy requirements• OHS guidelines relating to screen based equipment and ergonomic workstations are observed
Open file	<ul style="list-style-type: none">• Software appropriate for the task is selected• File is correctly identified and opened
Retrieve data	<ul style="list-style-type: none">• Data to be retrieved is located within the file
Close file	<ul style="list-style-type: none">• File is saved and closed• Program is exited in accordance with designated procedures• Data is stored in accordance with designated procedures

Range of Variables
Manufacturer's instructions for turning on the computer may include: <ul style="list-style-type: none">• ensuring all parts of the computer are properly connected• turning on both the computer and the screen
Log on procedures may include: <ul style="list-style-type: none">• entering a username• entering a password
<i>Designated speed and accuracy requirements may include:</i> <ul style="list-style-type: none">• efficient use of keyboard and mouse• minimum standard set by enterprise (number of keystrokes, percentage accuracy)• level set in government standards (Standards Australia)• ability to touch-type• identifying and editing errors as text is keyed in
OHS guidelines may include: <ul style="list-style-type: none">• equipment and posture• layout of workstation• radiation from computer screens• lighting• noise
Appropriate software may include: <ul style="list-style-type: none">• word processing packages• spreadsheet packages• database packages• desktop publishing packages
Correctly identifying and opening files may include: <ul style="list-style-type: none">• opening the appropriate software application• identifying the file path and name• selecting the file• using the open-file command

Range of Variables
<p>Locating data may include:</p> <ul style="list-style-type: none">• selecting the relevant<ul style="list-style-type: none">- section- page- paragraph- table• utilising keyboard commands to navigate around the document
<p>Saving and closing file may include:</p> <ul style="list-style-type: none">• using menu commands• using a short cut• clicking on an icon on the tool bar
<p>Designated procedures for exiting programmes may include:</p> <ul style="list-style-type: none">• manufacturer's guidelines• company guidelines• a specified order (when shutting down multiple programmes)• programmes that should not be shut down• ensuring all data is saved before exiting programmes
<p>Procedures for storing data may include:</p> <ul style="list-style-type: none">• electronic• hard copy• floppy disk• microfiche/microfilm• a combination of the above

Evidence Guide**Critical aspects:**

- computer equipment is operated correctly according to operating manuals and enterprise requirements
- log-on procedures are followed correctly according to enterprise policies and procedures
- keyboard is operated within designated speed and accuracy requirements
- demonstrates an understanding of the OHS hazards of using a computer and operates the computer according to OHS requirements
- own workstation complies with OHS requirements
- the purpose of the different types of software are correctly identified and disks are stored in accordance with enterprise procedures
- appropriate software is selected to carry out given task
- demonstrates an understanding of enterprise electronic file management system and correct file is identified and opened
- necessary data is retrieved
- file is saved without losing information according to enterprise policies and procedures
- applications are exited according to enterprise policies and procedures before shutting down computer
- log-off procedure is followed correctly, if necessary and the operating system exited as required

Resource implications:

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- computer equipment including relevant software
- workplace manuals and reference materials such as computer and software user manuals, company policy and procedural manuals

Consistency in performance:

This unit of competency will require evidence to be collected across a range of events, eg. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

Evidence Guide

Context of assessment:

Evidence of competency can be met in different situations, including:

- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times)

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Underpinning knowledge and skills
Knowledge

- a range of functions of computer equipment and software
- log-on and log-off procedures
- shut down procedures
- application of enterprise *policies and procedures* across the full range of tasks required

Skills

- literacy: follows *enterprise procedures* for office equipment; follows sequenced written and oral instructions
- communication: listens for specific information; participates in informal conversations; clarifies when necessary using simple questioning techniques;
- identifies and uses, with supervisor's support, appropriate equipment to complete a task

Key Competencies						
Utilisation of the Key Competencies required in the performance of this unit						
Communicating ideas and information	Collecting, analysing and organising information	Planning and organising activities	Working with others in a team	Using mathematical ideas and techniques	Solving problems	Using technology
*	*	1	1	1	1	1

Performance levels:

Level 1

- carries out established processes
- makes judgements of quality using given criteria

Level 2

- manages processes
- selects the criteria for the evaluation process

Level 3

- establishes principles and processes
- evaluates and reshapes processes
- establishes criteria for evaluation of processes

BSAORG101B Follow established work schedules to achieve designated team/section goals

This Unit covers following directions to identify, prioritise and complete individual tasks within enterprise timelines.

This unit may be assessed alone or in combination with other units making up a job role.

Element of Competency	Performance Criteria
Plan and organise a personal daily work routine	<ul style="list-style-type: none">• Tasks are allocated by <i>nominated person</i>• Tasks to be completed for the day are identified• The daily tasks are prioritised as directed• Tasks are broken down into smaller achievable components• Resources required to complete the tasks are selected and checked• Tasks and priorities are reviewed with a change of instruction from a <i>nominated officer</i>• Tasks are completed satisfactorily within <i>designated timelines</i>

Range of Variables
Tasks may include: <ul style="list-style-type: none">• clarifying and understanding own position description• a range of daily, weekly and monthly tasks• listing and/or mapping individual work roles and responsibilities
<i>Nominated person may include:</i> <ul style="list-style-type: none">• supervisor• manager• team leader
Daily tasks may relate to: <ul style="list-style-type: none">• drafting simple correspondence• retrieving files• recording messages• answering the telephone• greeting clients
Resources required may include: <ul style="list-style-type: none">• stationery• office equipment and printed material• planning tools and people• manuals• computer software
Reviewing tasks and priorities may include: <ul style="list-style-type: none">• a long-term or short-term basis• rearranging work schedule and/or timeline• consulting with a supervisor and/or colleague• adapting to unexpected change
Nominated officer may include: <ul style="list-style-type: none">• supervisor• manager• team leader

Evidence Guide

Critical aspects:

- individual tasks are clearly understood
- tasks are clarified with a supervisor when necessary
- tasks are continuously prioritised and reviewed when necessary
- large tasks are broken down into smaller, achievable components
- appropriate resources required to complete tasks are selected and checked
- the ability to set realistic timelines for the completion of tasks is demonstrated

Resource implications:

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- *enterprise policies and procedures*
- resources required for allocated work tasks
- planning resources
- resources required for completion of tasks

Consistency in performance:

This unit of competency will require evidence to be collected across a range of events, eg. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

Context of assessment:

Evidence of competency can be met in different situations, including:

- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times).

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Evidence Guide**Underpinning knowledge and skills****Knowledge**

- *enterprise policies and procedures*
- the different types of resources required to complete tasks
- various planning resources and tools
- team's goals and tasks
- the interdependence between individual and team goals

Skills

- literacy: reads specific information on routine correspondence and work activities as directed
- communication: listens for specific information on routine enquiry and follows instructions of one or two steps; participates in informal conversations; clarifies intended meaning of activity by asking for assistance, eg. repetition, alternative explanations
- numeracy: calculates time and makes time predictions; sorts, locates and uses time-related information

Key Competencies						
Utilisation of the Key Competencies required in the performance of this unit						
Communicating ideas and information	Collecting, analysing and organising information	Planning and organising activities	Working with others in a team	Using mathematical ideas and techniques	Solving problems	Using technology
1	1	1	1	1	1	1

Performance levels:

Level 1

- carries out established processes
- makes judgements of quality using given criteria

Level 2

- manages processes
- selects the criteria for the evaluation process

Level 3

- establishes principles and processes
- evaluates and reshapes processes
- establishes criteria for evaluation of processes

BSATEM101B Participate in a team to achieve designated tasks

This Unit covers completing allocated tasks in a team context within enterprise timelines.

This unit can be assessed alone or in combination with other units making up a job role.

Element of Competency	Performance Criteria
Complete allocated tasks	<ul style="list-style-type: none">• Tasks of the team as a whole are identified• Task(s) allocated to the individual as part of the team are identified• Allocated tasks are completed within <i>designated timelines</i>• Assistance is sought from other team members when difficulties in achieving allocated tasks arise• Information and feedback provided by others in the workgroup is acknowledged

Range of Variables
Tasks may include: <ul style="list-style-type: none">• activities to achieve team goals• group/team tasks• individual tasks
Identifying tasks may include: <ul style="list-style-type: none">• team leader identifying tasks and informing the team• team leader preparing a draft list of tasks and discussing with the team• the team discussing and identifying tasks as a group• brainstorming• seeking information from internal clients and other teams
Allocating tasks may include: <ul style="list-style-type: none">• team discussion regarding allocation of tasks• considering the skills of different team members• considering the skill gaps• considering team member commitments• team allocation of responsibilities
Designated timelines may include: <ul style="list-style-type: none">• personal deadlines• timelines allocated in discussion with the team leader• timelines agreed upon in discussion with the team members• client negotiated timelines
Difficulties that arise may include: equipment breakdowns (eg. computer crashes, photocopier breaks down, facsimile malfunction) <ul style="list-style-type: none">• insufficient resources (stationery shortage, staff shortage)• extra responsibilities• changing goals and priorities• unexpected delays

Range of Variables
<p>Feedback and information may relate to:</p> <ul style="list-style-type: none">• assisting a colleague• clarifying the enterprise's preferred task completion methods• monitoring completion of colleagues' tasks• open communication channels• encouraging colleagues• acknowledging satisfactory performance• acknowledging unsatisfactory performance
<p>Acknowledging feedback may include:</p> <ul style="list-style-type: none">• thanking team member for feedback• clarifying any ambiguous feedback• modifying behaviour with peers• modifying behaviour according to a colleague's or team leader's suggestions• recognising the validity of the feedback received• using feedback to facilitate improvement

Evidence Guide
<p>Critical aspects:</p> <ul style="list-style-type: none"> • participates in formal team communication • participates in identification of tasks required to achieve team goals • participates in task allocation process to ensure tasks allocated are appropriate • plans work to ensure timely completion of tasks • actively cooperates with other team members and demonstrates flexibility • allocated tasks are completed within <i>designated timelines</i> • any difficulties in achieving tasks are acknowledged and appropriate assistance is sought promptly
<p>Resource implications:</p> <p>The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:</p> <ul style="list-style-type: none"> • enterprise manuals and reference materials outlining <i>policies and procedures</i> • planning tools • scheduling tools
<p>Consistency in performance:</p> <p>This unit of competency will require evidence to be collected across a range of events, eg. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.</p>
<p>Context of assessment:</p> <p>Evidence of competency can be met in different situations, including:</p> <ul style="list-style-type: none"> • on the job assessment • off the job assessment • placement in an enterprise • participation in a New Apprenticeship (traineeship) arrangement • use of a Practice Firm or simulated work environment • flexible delivery methods used by training providers to cater for distance education students • Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times). <p>Evidence gathering methods may include:</p> <ul style="list-style-type: none"> • demonstration • questioning • workplace performance • role-play • projects/assignments • written tests (verbal usage and verbal comprehension) • portfolio of work documents • third party reports

Evidence Guide**Underpinning knowledge and skills****Knowledge**

- enterprise's goals
- range of teams with which individual has responsibilities
- *enterprise policies and procedures* across the range of tasks required
- team members' strengths

Skills

- literacy: follows *enterprise goals and procedures*; follows sequenced written and verbal instructions; extracts tasks from a list
- communication: listens for and notes specific information on routine procedures; participates in informal conversations; clarifies when necessary using simple questioning techniques and asks for assistance
- numeracy: adheres to timelines for group activities; records data

Key Competencies						
Utilisation of the Key Competencies required in the performance of this unit						
Communicating ideas and information	Collecting, analysing and organising information	Planning and organising activities	Working with others in a team	Using mathematical ideas and techniques	Solving problems	Using technology
1	1	1	1	1	1	*

Performance levels:

Level 1

- carries out established processes
- makes judgements of quality using given criteria

Level 2

- manages processes
- selects the criteria for the evaluation process

Level 3

- establishes principles and processes
- evaluates and reshapes processes
- establishes criteria for evaluation of processes

BSAFIN101B Prepare routine financial documents

This Unit covers competencies in petty cash transactions, invoices and banking documents.

This unit can be assessed alone or in combination with other units making up a job role.

Element of Competency	Performance Criteria
Claim reimbursement from a petty cash fund	<ul style="list-style-type: none">Petty cash voucher is completed according to <i>enterprise guidelines</i>Voucher is presented to <i>authorised person</i> for reimbursement
Complete requisitions	<ul style="list-style-type: none">Purchase and/or internal stock requisitions are completed according to <i>enterprise guidelines</i>Purchase/stock requisition is presented to <i>nominated person</i> for authorisationPurchase/stock requisition is presented within <i>designated timelines</i> to <i>nominated person</i> for processing
Complete receipts	<ul style="list-style-type: none">Receipts are completed according to <i>enterprise guidelines</i>Receipts are presented to <i>nominated person</i> for authorisationReceipts are forwarded to payer according to <i>enterprise guidelines</i>

Range of Variables
<p>Enterprise guidelines may include:</p> <ul style="list-style-type: none"> • attaching the receipt • filling out the petty cash voucher correctly and completely • ensuring a voucher is completed for all petty cash claims
<p>Nominated person for authorisation may include:</p> <ul style="list-style-type: none"> • store person • supervisor • authorised enterprise signatories • purchasing officer • administration support
<p>A purchase or stock requisition may be:</p> <ul style="list-style-type: none"> • paper-based • electronic
<p>Enterprise guidelines for a purchase and/or stock requisition may include:</p> <ul style="list-style-type: none"> • ensuring at least two copies are made • all required information is filled out accurately and completely
<p>Designated timelines may include:</p> <ul style="list-style-type: none"> • as soon as the requisition is complete and authorised • within a day • weekly, fortnightly, monthly
<p>Receipts may be:</p> <ul style="list-style-type: none"> • electronic • paper-based
<p>Completing receipts according to enterprise guidelines may include:</p> <ul style="list-style-type: none"> • retaining copy • filing copy with accounts department
<p>Enterprise guidelines may include:</p> <ul style="list-style-type: none"> • format for completing documents (eg. requisitions, receipts) • timelines for filing copies of documents • gaining authorisation for requisitions

Evidence Guide**Critical aspects:**

- when dealing with petty cash, *enterprise policies and procedures* are followed at all times
- all vouchers are written accurately into the petty cash book
- the petty cash book is presented to *appropriate person* for verification
- requisition form is prepared correctly and sent to the *purchasing officer*
- purchase order is prepared correctly and sent to the *supplier*
- purchase invoice is checked against the delivery docket for accuracy including all calculations, order details and extensions
- correct invoice is signed, delivery docket, purchase order and remittance advice is forwarded to the *appropriate person/department*
- all documentation is checked and amendments are correct when returning goods
- purchase order, delivery docket and invoice are grouped together and presented to *appropriate person* for identification

Resource implications:

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- petty cash vouchers
- deposit slips
- credit notes
- purchase orders
- cheques
- calculator

Consistency in performance:

This unit of competency will require evidence to be collected across a range of events, eg. dealing with different office requirements, and over a period of time to ensure that situational variables are consistently achieved.

Evidence Guide**Context of assessment:**

Evidence of competency can be met in different situations, including:

- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in a New Apprenticeship (traineeship) arrangement
- use of a Practice Firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times)

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignments
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

Underpinning knowledge and skills**Knowledge:**

- accounting procedures in relation to petty cash
- enterprise policies and procedures in relation to all given tasks
- simple calculations
- credit card procedures

Skills:

- literacy: reads and understands an organisation's simple financial procedures
- numeracy: uses knowledge of mathematical concepts; orders and groups number, shape, data and measurement explaining any simple relationships or patterns.
- communication: listens to and follows oral instructions; questions to clarify information

Key Competencies						
Utilisation of the Key Competencies required in the performance of this unit						
Communicating ideas and information	Collecting, analysing and organising information	Planning and organising activities	Working with others in a team	Using mathematical ideas and techniques	Solving problems	Using technology
1	1	1	1	1	1	1

Performance levels:

Level 1

- carries out established processes
- makes judgements of quality using given criteria

Level 2

- manages processes
- selects the criteria for the evaluation process

Level 3

- establishes principles and processes
- evaluates and reshapes processes
- establishes criteria for evaluation of processes