

**Administration Training Package BSA97**

**Administration Competency Standards**

**Level 2**

**(Enhanced)**

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## BSAINF201B Handle mail to facilitate information flow

This Unit covers receiving and distributing incoming mail and collecting and despatching outgoing mail. It also covers collating and despatching bulk mail according to Australia Post specifications.

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

Element of Competency	Performance Criteria
Organise courier for emergency and same day deliveries	<ul style="list-style-type: none"><li>• Items for emergency delivery are weighed, wrapped and addressed</li><li>• Cheapest and best option for delivery is determined and selected</li><li>• Follow-up is made if necessary</li></ul>

Range of Variables
<b>Incoming mail may be:</b> <ul style="list-style-type: none"><li>• paper based</li><li>• electronic (e.g. faxes, email )</li><li>• internal</li><li>• external</li><li>• urgent</li><li>• confidential</li><li>• letters</li><li>• journals</li><li>• other correspondence</li></ul>
<b>Checking mail may include:</b> <ul style="list-style-type: none"><li>• mail marked 'confidential', 'urgent' or 'personal'</li><li>• mail sent "express post" or registered</li><li>• mail that has been damaged</li><li>• mail that looks suspicious</li><li>• enclosures</li></ul>
<b>Mail register may include:</b> <ul style="list-style-type: none"><li>• electronic (database)</li><li>• paper based (mail book, form, file)</li></ul>
<b>Ensuring accuracy of <i>records</i> may include checking:</b> <ul style="list-style-type: none"><li>• the date received</li><li>• the sender</li><li>• the addressee</li><li>• the subject</li><li>• assigning a file number</li><li>• the condition of mail item (damaged, no return address)</li></ul>
<b>Prompt delivery of urgent and confidential mail may include:</b> <ul style="list-style-type: none"><li>• immediate, hand delivery, express post, registered</li><li>• separating and prioritising urgent mail</li></ul>
<b>Sorting mail may include:</b> <ul style="list-style-type: none"><li>• separating urgent mail to be distributed first</li><li>• sorting by departments</li><li>• sorting by location</li><li>• sorting by seniority of personnel</li><li>• separating internal (organisational) mail and external mail</li><li>• separating by order of importance for each individual</li><li>• separating junk mail</li><li>• sorting invoices, cheques and accounts</li></ul>

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



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

Range of Variables
<p><b>Cheapest and best option may be determined by:</b></p> <ul style="list-style-type: none"><li>• time constraint</li><li>• delivery location</li><li>• nature of contents (bulky, fragile, confidential)</li><li>• quantity of delivery items</li></ul>

### 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 according to whether it is:
  - confidential or personal
  - urgent
  - damaged mail
  - 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 when not on mail envelope is attached
- contents of mail is kept in form and sequence in which it arrived
- mail is stamped with date of receipt
- 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 correctly 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
- items for urgent despatch are prepared correctly, eg:
  - weighed
  - recorded
  - secured
  - wrapped
  - taped
  - tied
  - addressed
  - labelled
  - consignment notes
- all documentation is correct and complete
- most appropriate and cost efficient option for urgent delivery is identified and selected
- courier company is contacted to follow up missing or lost documents/parcels if necessary
- problems are clarified and assistance is sought when necessary

Evidence Guide
<p><b>Resource implications:</b></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"><li>• workplace manuals and reference materials such as enterprise policy, procedural manuals, staff directories and organisational charts, postal charges booklets</li></ul>
<p><b>Consistency in performance:</b></p> <p>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.</p>
<p><b>Context of assessment:</b></p> <p>Evidence of competency can be met in different situations, including:</p> <ul style="list-style-type: none"><li>• on the job assessment</li><li>• off the job assessment</li><li>• placement in an enterprise</li><li>• participation in a New Apprenticeship (traineeship) arrangement</li><li>• use of a Practice Firm or simulated work environment</li><li>• flexible delivery methods used by training providers to cater for distance education students</li><li>• Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times)</li></ul> <p>Evidence gathering methods may include:</p> <ul style="list-style-type: none"><li>• demonstration</li><li>• questioning</li><li>• workplace performance</li><li>• role-play</li><li>• projects/assignments</li><li>• written tests (verbal usage and verbal comprehension)</li><li>• portfolio of work documents</li><li>• third party reports</li></ul>

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

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

**Skills**

- literacy: follows *enterprise policies and procedures*; records incoming and outgoing mail and checks for accuracy of address details
- numeracy: checks weights and addresses; records items; sorts and collates; estimates time for mail despatches and bulk mailouts
- communication: listens to clear sequenced instructions of several steps to complete task; participates effectively in spoken interactions in order to convey actions and outcomes; consults and questions supervisor and peers to clarify status of mail/documents; gives oral instructions to peers, eg. where to locate mail
- problem solving: chooses appropriate delivery method for mail/court documents

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

**BSAINF202B Process and analyse information to provide access to and security of records**

This Unit covers locating information about the enterprise and using and maintaining the enterprise's records and filing system.

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

Element of Competency	Performance Criteria
Process and analyse information requests	<ul style="list-style-type: none"><li>• Main sources of everyday information are located within the office</li><li>• Information about enterprise products and services is understood and utilised</li></ul>
File documents	<ul style="list-style-type: none"><li>• Documents are classified and sorted to maintain the integrity of the system</li><li>• Classification uncertainties are referred to an <i>appropriate authority</i></li><li>• Documents are indexed and filed in the <i>correct location and sequence</i></li></ul>
Identify and retrieve documents	<ul style="list-style-type: none"><li>• Specified files/records are located within the <i>designated timelines</i></li><li>• Located files are extracted from system and despatched to the <i>nominated person</i></li><li>• <i>Security and confidentiality procedures</i> are followed</li></ul>
Update and modify existing enterprise records	<ul style="list-style-type: none"><li>• Records are kept up to date to maintain the integrity of the system</li><li>• Records are kept accurate to maintain the integrity of the system</li><li>• Records are filed to maintain the integrity of the system</li><li>• Individual items are gathered and entered into the filing system</li><li>• New files are recorded and indexed</li></ul>

Element of Competency	Performance Criteria
Remove inactive and dead files	<ul style="list-style-type: none"><li>• Designated inactive files are removed from the working system, recorded and stored to ensure the system is maintained in an up-to-date manner</li><li>• Designated dead files are removed from the working system and archived</li><li>• File index is updated to show current status of records on file</li></ul>



**Range of Variables****Main sources of everyday information may include:**

- correspondence (faxes, memos, letters, email)
- computer databases (library catalogue, customer records)
- computer files (letters, memos and other documents)
- sales records (monthly forecasts, targets achieved)
- forms (insurance forms, membership forms)
- invoices (from suppliers, to debtors)
- personnel records (personal details, salary rates)
- minutes of meetings

**Information about enterprise products and services may include:**

- product information (price lists, catalogues)
- promotional material (newsletters, brochures, advertised special offers)
- annual reports

**Documents may be classified and sorted according to:**

- 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

**An *appropriate authority* may refer to the:**

- 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

**Indexing files may include:**

- determining logical sequence of the document/file
- indexing by subject
- indexing by alphabetical order
- indexing by numerical order

Range of Variables
<p><b>Filing new documents may include:</b></p> <ul style="list-style-type: none"> <li>• classifying and sorting documents</li> <li>• checking the document is not damaged</li> <li>• fastening documents to be filed together securely (paper-clipped, stapled)</li> <li>• attaching relevant notes or instructions to the document securely</li> <li>• ensuring documents go into the filing system in their original condition</li> </ul>
<p><b>Correct location and sequence may be determined by:</b></p> <ul style="list-style-type: none"> <li>• status of the file (confidential, closed, archive material, or used daily)</li> <li>• the subject area of the document</li> <li>• categorising the document further (alphabetical, numerical order)</li> </ul>
<p><b>Designated timelines may include:</b></p> <ul style="list-style-type: none"> <li>• urgent deadlines (for a same day meeting, urgent request)</li> <li>• by the end of the day</li> <li>• by tomorrow</li> <li>• by next week</li> </ul>
<p><b>Nominated person may include:</b></p> <ul style="list-style-type: none"> <li>• internal (supervisor, another person within the department, a person outside the department but within the enterprise)</li> <li>• external (someone from within the enterprise requesting the information be sent to a person outside of the enterprise)</li> </ul>
<p><b>Security and confidentiality procedures may include:</b></p> <ul style="list-style-type: none"> <li>• signed authorisation from the manager/supervisor</li> <li>• passwords for files stored electronically on the computer</li> <li>• files tagged to indicate security rating (general, personal, restricted, confidential, secret, top secret)</li> <li>• locking restricted access files in a secure location</li> <li>• monitoring of paper based files and documents removed from the filing system (using outcards, file markers, passing slips, a file register)</li> </ul>
<p><b>Records that may require updating include:</b></p> <ul style="list-style-type: none"> <li>• file index (recording new files, movements of existing files)</li> <li>• stock records (stationery items, sales products)</li> <li>• sales records</li> <li>• client address details</li> <li>• account details</li> <li>• records affected by policy, procedural, regulatory or legislative change</li> </ul>

**Range of Variables****Ensuring accuracy of records may include checking:**

- file codes
- index to the filing system
- dates
- cash amounts/figures
- names, titles and addresses
- telephone/fax/mobile phone/pager numbers, email and website addresses
- out of date information has been replaced

**Inactive files may be:**

- files containing information that is not currently in use but may be needed in the future

**Dead files may include:**

- closed files which must be kept for a specific period (taxation documents, business documents)
- closed files which are to be kept for historical or research purposes

**Inactive and dead files may be stored:**

- in archive boxes
- in separate filing cabinets
- on microfiche/microfilm
- in compressed computer-based records
- on CD ROMs or floppy disks
- in a separate location, external to the office
- in a fire/waterproof location

**Evidence Guide****Critical aspects:**

- information requests are prioritised appropriately
- different types of records held by the enterprise and main sources of information are identified and located correctly
- storage media used by the enterprise is identified correctly and its purpose understood
- information about enterprise products and services is understood and utilised appropriately
- documents are sorted and classified appropriately
- uncertainties about classifications are referred to the *appropriate authority*
- documents are indexed according to enterprise's *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's *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
- records are updated appropriately
- filing is done regularly to ensure system remains up-to-date
- records are checked for accuracy (eg. file codes, dates, cash amounts etc.)
- individual items are checked when entering them into the filing system to ensure that:
  - the document has been released for filing
  - document is classified
  - index is updated
  - items are filed in correct location
- designated inactive files are removed from the working area
- inactive files are stored according to enterprise's *policies and procedures*
- file index is updated to reflect current status and location of records

**Evidence Guide****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.

**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's *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
- information dissemination processes

**Skills**

- literacy: follows and interprets an enterprise's *policies and procedures*; sorts and classifies information; locates files; writes clear sequenced written instructions, eg. how to use filing system, record document movement
- numeracy: sequences and indexes files, checks file codes are correct; adheres to *designated timelines*
- keyboarding/computer
- communication: listens to clear sequenced instructions of several steps to complete task; questions to clarify status of file; gives oral instructions, eg. where to locate file; questions to clarify intended meaning of text
- problem solving: chooses appropriate file according to enterprises's *procedures*, drawing upon precedent and prior knowledge.

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





**BSACOM201B Receive and pass on oral messages to facilitate effective routine communication**

This Unit covers receiving and relaying oral messages, answering telephones and handling telephone queries, transferring telephone calls and making telephone calls.

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"><li>• Message is understood and clarified, if necessary</li><li>• Message is accurately recorded, if necessary</li><li>• Message is accurately relayed to <i>nominated person</i> within <i>designated timelines</i></li></ul>
Respond to incoming telephone calls	<ul style="list-style-type: none"><li>• Calls are answered promptly and clearly using <i>designated enterprise protocol</i></li><li>• Callers are correctly identified and their requirements accurately established</li><li>• Callers are given only disclosable information</li><li>• Callers' enquiries are answered or transferred to the <i>appropriate location/person</i></li></ul>
Make telephone calls	<ul style="list-style-type: none"><li>• Telephone numbers are correctly obtained and contact established</li><li>• Purpose of outgoing calls is clearly conveyed</li><li>• Telephone equipment used is inclusive, but not exclusive, of:<ul style="list-style-type: none"><li>– picking up a group</li><li>– transferring calls</li><li>– putting calls on hold</li><li>– redialing</li><li>– conference calls</li></ul></li></ul>

Range of Variables
<p><b>Understanding and clarifying the message may include:</b></p> <ul style="list-style-type: none"> <li>• asking questions</li> <li>• clarifying details</li> <li>• repeating the message back to the caller</li> </ul>
<p><b>Accurately recording the message may include:</b></p> <ul style="list-style-type: none"> <li>• recording who the message is for</li> <li>• recording the caller's name, organisation, phone/fax number</li> <li>• recording the message in a clear and concise manner</li> <li>• recording the date and time of the message</li> <li>• initialling the message</li> </ul>
<p><b>Accurately relaying the message may include:</b></p> <ul style="list-style-type: none"> <li>• passing the message on in person (orally)</li> <li>• leaving the written message in the appropriate place, eg. on nominated person's/ secretary's message spike, desk</li> <li>• distributing message to in-trays, pigeon holes, desks, via e-mail</li> </ul>
<p><b>The <i>nominated person</i> may include:</b></p> <ul style="list-style-type: none"> <li>• addressee</li> <li>• the person specified by the caller</li> <li>• supervisor</li> </ul>
<p><b>Within <i>designated timelines</i> may include:</b></p> <ul style="list-style-type: none"> <li>• relaying the message to the appropriate person as soon as possible</li> <li>• relaying the message within a certain time limit</li> <li>• relaying the message within the time stipulated by the person leaving the message</li> </ul>
<p><b>Answering calls promptly and clearly within <i>designated enterprise protocol</i> may include:</b></p> <ul style="list-style-type: none"> <li>• answering calls within a specified number of rings</li> <li>• using a standard enterprise greeting</li> <li>• speaking clearly with a professional/pleasant tone of voice</li> </ul>
<p><b>Correctly identifying callers and accurately establishing their requirements may include:</b></p> <ul style="list-style-type: none"> <li>• asking the caller his/her name and the company he/she represents (if appropriate)</li> <li>• clarifying who the caller wishes to speak to</li> <li>• clarifying what the caller's enquiry is about</li> <li>• establishing that the caller has dialled the correct number</li> <li>• establishing that your enterprise is able to assist the caller</li> <li>• establishing which of your enterprise's staff can assist the caller</li> </ul>

**Range of Variables****Undisclosable information may include:**

- personal details of people who work at the enterprise (eg home phone numbers, addresses)
- names and information about the enterprise's clients
- financial information
- information regarding products in development
- confidential information

**Transferring caller's enquiries to the *appropriate location/person* may include:**

- being familiar with routine information so that enquiries can be answered without having to transfer the call to someone else
- being familiar with the roles and areas of responsibility of personnel/departments
- clarifying what the caller is inquiring about so that he/she can be transferred to the person who is best able to help

**Correctly obtaining telephone numbers may include:**

- consulting internal directories
- consulting client directories
- consulting business directories
- consulting the White/Yellow Pages, hard/electronic copy
- using directory assistance
- checking relevant business cards
- checking relevant databases

**Clearly conveying the purpose of outgoing calls may include:**

- knowing the correct title, name and position of the person to be contacted
- knowing what information is to be gained from making the call (purpose of the call)
- clearly explaining the reason for making the call

**Evidence Guide****Critical aspects:**

- enterprise's *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 and clearly and relayed to *nominated person* within *designated timelines*
- if message is relayed orally, clear and appropriate language is used
- calls are answered within *designated enterprise timelines*
- caller is greeted using clear and pleasant tone of voice and appropriate enterprise greeting
- caller's name, organisation and requirements are accurately identified
- non-disclosable information is not communicated and where any doubt exists as to the information's status it is not disclosed
- routine questions within scope of own responsibility are identified and answered correctly
- the roles of an enterprise's personnel/departments are understood and enquiries are directed appropriately
- calls are transferred with clarity and ease to correct location/person
- caller's details are accurately summarised and clearly communicated to person receiving the transferred call
- correct telephone number for outgoing call is obtained and contact is established
- name, organisation and purpose of call is clearly conveyed
- any information received is accurately recorded
- telephone equipment is handled correctly
- 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

**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's 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 basic organisational policies and procedures; completes forms using routine data; eg. telephone message pad to summarise routine work-related spoken information for others; spells most routine workplace vocabulary with reasonable accuracy using references for support when necessary, eg. client's names and addresses, workplace products; uses punctuation as an aid to understanding
- communication: relays information accurately; listens actively; uses clear speaking voice and correct pronunciation; questions to clarify information
- referral skills to divert calls to appropriate persons
- proofreads own writing to check clarity of meaning and conformity to organisational procedures
- presentation requirements and telephone etiquette: follows enterprise procedures for routine greeting
- numeracy: records telephone numbers; sorts messages
- technical: transfers calls, paging, email

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

**BSACOM202B Receive and pass on written information to  
facilitate communication flow**

This Unit covers receiving and relaying written messages and writing simple documents such as standard letters and memoranda.

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 written messages	<ul style="list-style-type: none"><li>• Message received is understood and relayed to the <i>nominated person</i> within <i>designated timelines</i></li></ul>
Draft simple correspondence	<ul style="list-style-type: none"><li>• Messages are written on <i>designated message pad</i></li><li>• Simple correspondence is drafted and presented for approval and signature within <i>designated timelines</i></li><li>• Text is written using clear and concise language</li><li>• Spelling, punctuation and grammar are correct</li><li>• Intended meaning of correspondence is readily understood by recipient</li><li>• Information is self-checked and presented for frequent progress checks by <i>designated officer</i></li></ul>

Range of Variables
<p><b>Understanding the message received may include:</b></p> <ul style="list-style-type: none"><li>• listening actively</li><li>• questioning</li><li>• ensuring all details in the message are clear</li><li>• contacting the person who forwarded the message to clarify details if information is unclear</li><li>• confirming details</li></ul>
<p><b>Relaying the message to the <i>nominated person</i> may include:</b></p> <ul style="list-style-type: none"><li>• relaying the message directly to the intended recipient</li><li>• distributing the written message on by placing it into the intended recipient's in-tray/pigeon hole, electronic mail box</li></ul>
<p><b>Within <i>designated timelines</i> may include:</b></p> <ul style="list-style-type: none"><li>• relaying the message to the appropriate person as soon as possible</li><li>• relaying the message to the intended recipient within a specific period of time</li><li>• obtaining signatures within a specific period of time</li></ul>
<p><b>The <i>designated message pad</i> may include:</b></p> <ul style="list-style-type: none"><li>• a special message pad for the purpose of recording messages</li><li>• following specific organisation procedures for recording messages</li><li>• electronic mail</li></ul>
<p><b>Simple correspondence may include:</b></p> <ul style="list-style-type: none"><li>• fax cover sheets</li><li>• memoranda</li><li>• letters</li><li>• phone messages</li><li>• notes</li><li>• email messages</li><li>• following the enterprise's guidelines</li></ul>
<p><b>Clear and concise language may include:</b></p> <ul style="list-style-type: none"><li>• using language that is easily understood by the audience</li><li>• using as few words as necessary to relay the information</li><li>• using plain English and correct punctuation so there is no confusion for the reader</li><li>• only including information that is relevant to the situation</li></ul>



**Range of Variables****Using correct spelling, punctuation and grammar may include:**

- self-checking the document for spelling, punctuation and grammatical errors
- using a dictionary to check for correct spelling, punctuation and grammar
- seeking feedback regarding correct spelling, punctuation and grammar

**Ensuring the intended meaning of the correspondence is understood may include:**

- using plain English
- writing clearly, concisely, correctly
- checking for understanding (eg seeking feedback to confirm intended message is conveyed)

**Information is self-checked may include:**

- reading drafts
- checking for accuracy of spelling, punctuation and grammar
- checking for clarity of meaning
- checking for relevance of information for intended audience
- making corrections

**Frequent progress checks may include:**

- presenting the improved version to the appropriate person for feedback and/or approval
- making any necessary amendments and presenting an updated draft for approval
- repeating this process until the draft is complete

***Designated officer* may include:**

- supervisor
- work colleague
- manager

### Evidence Guide

**Critical aspects:**

- enterprise's *policies and procedures* are understood and followed
- message type is identified and purpose of message is accurately understood
- message is clarified with appropriate person if necessary
- message is relayed to nominated person within *designated timelines*
- the roles and responsibilities of an enterprise's *personnel/departments* are understood and written messages are directed appropriately
- written information is clear, concise and correct
- purposes of various routine documents are understood
- documents produced are in the correct format
- document is drafted using the appropriate style, language, tone and format
- documents are self checked for spelling errors, grammatical mistakes and punctuation
- information is accurate and organised in a logical order
- abbreviations, slang, jargon and discriminatory or sexist language are not used
- document is checked to ensure that intended meaning is conveyed
- written information is presented according to the enterprise's *policies and procedures*
- the correct signature is obtained, if necessary
- document is presented to appropriate person for progress checks and final approval if necessary
- amendments are made where necessary
- copies of final drafts are prepared and filed if necessary
- any difficulties are referred to *designated person* and assistance is sought if 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 company policy, procedural manuals and checklists
- appropriate technology such as computers with relevant software, photocopiers, facsimile machines

**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**

- computer equipment/software and its functions
- application of the enterprise's *policies and procedures* required in the full range of tasks covered
- intended audience
- roles and responsibilities of personnel/departments

**Skills**

- literacy: follows basic enterprise *policies and procedures*; takes messages; comprehends simple instructions and drafts simple correspondence following enterprise model; summarises routine work-related written information for others; spells most routine workplace vocabulary with reasonable accuracy using references for support when necessary, eg. clients' names and addresses, workplace products; uses punctuation as an aid to understanding
- proofreads own writing to check clarity of meaning, conformity to enterprise's presentation requirements
- communication: asks questions to clarify meaning when listening or reading
- technical: operates computer equipment/software; keyboarding
- time management

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

## BSAENT201B Apply knowledge of enterprise to promote its products and services

This Unit covers knowledge of specific enterprise personnel/departments and procedures. It also covers providing information to clients, either internal or external, over the telephone or in attending to visitors.

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

Element of Competency	Performance Criteria
Apply knowledge of enterprise to complete routine administrative tasks	<ul style="list-style-type: none"> <li>• <i>Key functions</i> and <i>personnel/departments</i> are identified</li> <li>• Office <i>procedures</i> and their application are understood</li> </ul>
Provide information from own function area	<ul style="list-style-type: none"> <li>• Enquiries are dealt with promptly and courteously</li> <li>• Details of enquiry are established by questioning and summarising</li> <li>• Problems are anticipated and details clarified</li> <li>• Information relevant to enquirer's need is provided</li> </ul>
Redirect enquiries	<ul style="list-style-type: none"> <li>• Enquiries identified as being outside the employee's area of responsibility/knowledge are referred to the <i>nominated person/section</i> for resolution</li> <li>• If <i>nominated person</i> is not available subsequent follow-up action is undertaken</li> <li>• Problems are clarified, discussed and solutions sought</li> </ul>
Take follow-up action when required	<ul style="list-style-type: none"> <li>• Additional information is obtained and forwarded to enquirer</li> <li>• Difficulties with follow-up referred to <i>relevant person</i></li> </ul>
Promote a positive image of the enterprise	<ul style="list-style-type: none"> <li>• Greet visitors promptly and politely</li> <li>• Attend to visitors' needs appropriately and courteously</li> <li>• Relevant person is notified of visitors' arrival</li> </ul>

Range of Variables
<p><b>Key functions may include:</b></p> <ul style="list-style-type: none"><li>• filing</li><li>• handling the mail</li><li>• answering the telephone</li><li>• processing accounts</li><li>• greeting visitors</li><li>• handling enquiries</li></ul>
<p><b>Personnel may include:</b></p> <ul style="list-style-type: none"><li>• finance manager</li><li>• accountant</li><li>• payroll officer</li><li>• sales manager</li><li>• sales people</li><li>• administration manager</li><li>• receptionist</li><li>• personal assistant</li><li>• database officer</li><li>• marketing manager</li><li>• desktop publisher</li><li>• copy writer</li></ul>
<p><b>Departments may include:</b></p> <ul style="list-style-type: none"><li>• accounts department</li><li>• sales</li><li>• production department</li><li>• administration</li><li>• advertising/marketing</li></ul>
<p><b>Office procedures may involve:</b></p> <ul style="list-style-type: none"><li>• answering the telephone</li><li>• greeting a client</li><li>• directing a client to another section of the enterprise</li><li>• handling enquiries</li><li>• handling difficult clients or callers and referring them to the right person</li><li>• giving sanctioned information to external clients</li><li>• handling confidential information</li><li>• handling and recording requests</li></ul>
<p><b>Understanding the application of office procedures may involve:</b></p> <ul style="list-style-type: none"><li>• consulting the enterprise's induction kit or policies and procedures manual</li><li>• watching and listening to the way other staff perform office procedures</li><li>• asking the supervisor for advice</li></ul>

**Range of Variables****Enquiries may include people wanting to:**

- find out about office opening hours
- find out who they should speak to about a problem
- arrange an appointment with someone within the enterprise
- find out about special products or services the enterprise offers
- find out about special offers such as discounts
- find out about the availability of products or services
- complain about the company's products and/or services

**Dealing with enquiries promptly and courteously may involve:**

- acknowledging the client immediately
- greeting the client in a polite and friendly manner
- giving, wherever possible, the client immediate and total attention

**Details of an enquiry may include:**

- general information enquiry
- request for information to be despatched
- information about discounts, new product/service
- referral to another department/colleague
- request for promotional material

**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

**Anticipating problems may include:**

- knowing roles and responsibilities of colleagues
- accurately recording relevant clients details
- referring the information to the appropriate person as soon as possible
- explaining the situation clearly to the client
- checking with the supervisor/manager to ensure the correct information is given
- accessing the most recent information on products/promotions/services
- checking with the manager/supervisor that the client is authorised to receive the information requested

**Clarifying details may include:**

- asking the client additional questions
- giving additional details to the client
- ensuring the client knows what is available from the enterprise
- explaining to the client what information is available

Range of Variables
<p><b>Providing relevant information may include:</b></p> <ul style="list-style-type: none"><li>• clarifying what information is being asked for</li><li>• identifying the relevant information that should be sent</li><li>• asking for assistance if request for information is unclear</li><li>• identifying the correct procedure for supplying the information</li><li>• keeping a record of the enquiry</li></ul>
<p><b>The <i>nominated person/section</i> may include:</b></p> <ul style="list-style-type: none"><li>• finance manager</li><li>• accountant</li><li>• payroll officer</li><li>• sales manager</li><li>• sales people</li><li>• administration manager</li><li>• receptionist</li><li>• personal assistant</li><li>• database officer</li><li>• marketing manager</li><li>• desktop publisher</li><li>• copy writer</li><li>• accounts section</li><li>• sales</li><li>• production section</li><li>• administration</li><li>• advertising/marketing</li></ul>
<p><b>Referring enquires to the <i>nominated person/section</i> may include:</b></p> <ul style="list-style-type: none"><li>• transferring/introducing the client to a more appropriate person within the enterprise</li><li>• following the correct procedures for contacting another person from within the enterprise</li><li>• directing the client to appropriate department if the client has called in person</li><li>• recommending an alternative person/course of action if the appropriate person is unavailable</li><li>• providing the details of the appropriate person to the client</li><li>• ensuring the client is happy with the suggested solution</li></ul>
<p><b>Subsequent follow-up action may include:</b></p> <ul style="list-style-type: none"><li>• recording relevant client details</li><li>• passing on the information to the appropriate person as soon as possible</li><li>• explaining the situation clearly to the client</li><li>• recommending an alternative person</li><li>• referring the situation to the supervisor</li><li>• making an appointment</li></ul>



**Range of Variables****Clarifying and resolving problems may include:**

- seeking advice from appropriate colleagues
- consulting enterprise *policy and procedures* manual
- consulting client

**Additional information to be obtained and forwarded may include**

- product brochures
- catalogues
- order forms
- policy documents
- price lists
- leaflets/brochures detailing company services
- website address

**Follow-up action may include:**

- sending material to clients
- following up an enquiry
- seeking further assistance from a colleague or supervisor

**The *relevant person* may include:**

- the supervisor
- the appropriate person within the enterprise

**Greeting visitors promptly and politely may include:**

- being well-mannered and courteous
- being well-spoken and well-groomed
- being well-informed and organised

**Attending to visitor's needs appropriately and courteously may include:**

- using effective listening skills
- understanding your enterprise's structure and activities
- responding to requests for information as quickly as possible
- being familiar with the office layout

**Notifying the relevant person of a visitor's arrival may include:**

- following the correct procedures for contacting another person from within the enterprise
- directing the client to appropriate department if the client has called in person
- recommending an alternative person if the *relevant person* is unavailable

### Evidence Guide

**Critical aspects:**

- own role and responsibilities and that of other *personnel/departments* are identified and understood, including correct names and titles
- structure of enterprise and its *key functions* are identified and understood and can be communicated clearly to others
- *enterprise policies and procedures* and their application are understood and adhered to
- when dealing with enquiries over the telephone, uses appropriate enterprise greeting and a clear and pleasant tone of voice
- enquiries within own area of responsibility are dealt with promptly and courteously according to *enterprise policies and procedures*
- details of enquiry are clarified if necessary
- the nature of non-disclosable information is understood and non-disclosable information is not communicated
- available information about enterprise products and services is located, identified, understood and utilised as necessary
- information relevant to enquirer's needs is identified and provided to client promptly as required
- client requests are recorded according to *enterprise policies and procedures*
- requests outside own area of responsibility are referred to *relevant person*
- when appropriate person is not available follow-up procedure is undertaken according to *enterprise policies and procedures*
- problems and difficulties with handling requests are anticipated and appropriate responses are identified
- when the request for information cannot be dealt with at once follow-up action is undertaken according to *enterprise policies and procedures*
- visitors to the enterprise are greeted promptly and politely
- when dealing with clients a positive image of the enterprise is conveyed at all times
- appropriate person is notified of visitor's arrival according to *enterprise policies and procedures*
- 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 informative and promotional material; locates and extracts specific information to meet a client's request
- communication: elicits and gives factual information for the purposes of promoting the enterprise; questions to clarify information; participates in short interpersonal exchanges, clarifies meaning and maintains interaction for the purpose of establishing, maintaining and developing relationships
- problem solving: interprets enterprise information; relies on prior experience and examples to select appropriate methods of solution; identifies to whom to refer the query
- interpersonal skills and 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

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

**BSAENT202B Follow occupational health and safety policies and procedures in the workplace in order to ensure own safety and that of others in the workplace**

This Unit of Competency is equivalent to the Worksafe Australia OHS Generic Competency A. This Unit covers understanding what hazards exist in the workplace, the procedures for dealing with them and assisting in the management of Occupational Health and Safety.

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

Element of Competency	Performance Criteria
Follow workplace procedures for hazard identification and risk control	<ul style="list-style-type: none"><li>• Hazards in the work area are recognised and reported to <i>designated personnel</i> according to <i>workplace procedures</i></li><li>• <i>Workplace procedures</i> and work instructions for controlling risks are followed accurately</li><li>• <i>Workplace procedures</i> for dealing with accidents, fire and other emergencies are followed whenever necessary within the scope of responsibilities and competencies</li></ul>
Contribute to participative arrangements for the management of OHS	<ul style="list-style-type: none"><li>• OHS issues are raised with <i>designated personnel</i> in accordance with <i>workplace procedures</i> and relevant OHS legislation</li><li>• Contributions to OHS management in the workplace are made within <i>enterprise procedures</i> and the scope of responsibilities and competencies</li></ul>

Range of Variables
<p><b>Hazards in the work area may include:</b></p> <ul style="list-style-type: none"> <li>• performing tasks that involve repetitive movement, poor posture or forceful movements</li> <li>• radiation from a screen or monitor</li> <li>• floor surfaces that are polished especially if wet</li> <li>• carpet which is wrinkled, becoming loose or unstuck</li> <li>• telephone cords, cables and electric cords lying across the floor</li> <li>• objects blocking clear and safe access of corridors, entry and exit points</li> <li>• filing cabinets crowded into small spaces</li> <li>• more than one drawer of a filing cabinet being opened at the same time</li> <li>• climbing or balancing to reach items from a storage area</li> <li>• heavy/awkward items being placed on the top or bottom shelves of a storage system</li> <li>• inaccessible or awkward access to items in a storage area</li> <li>• compactus or mobile storage units</li> <li>• annoying or disturbing noise</li> <li>• air conditioning (potential diseases in office air circulating systems, too hot/cold, staff sitting too close to the air outlet)</li> <li>• photocopiers and printers emitting ozone gas</li> <li>• glare from a computer screen</li> <li>• flickering lights</li> <li>• inadequate or dim lighting</li> <li>• manual handling of heavy boxes</li> <li>• moving heavy equipment</li> <li>• pushing heavy trolleys</li> <li>• chemical hazards (toner dust, cleaning fluids)</li> <li>• social and psychological hazards (stress, underwork, overwork, negative office environment, substance abuse, organisational change)</li> </ul>
<p><b>Designated personnel may include:</b></p> <ul style="list-style-type: none"> <li>• enterprise's Occupational Health and Safety (OHS) representative</li> <li>• enterprise's health and safety committee</li> <li>• supervisor or manager</li> <li>• first aid officer</li> <li>• OHS authority</li> </ul>
<p><b>Workplace procedures may involve:</b></p> <ul style="list-style-type: none"> <li>• following the Codes of Practice issued by the state or territory OHS authority</li> <li>• particular health and safety procedures relating to the tasks and activities specific to the enterprise</li> <li>• signs and posters displayed around the workplace reminding and informing workers of enterprise hazards and the correct procedures for working safely</li> <li>• following the enterprise's health and safety manual</li> </ul>

Range of Variables
<p><b>Workplace procedures and work instructions for controlling risks may include:</b></p> <ul style="list-style-type: none"> <li>• reporting the risk to the OHS representative, supervisor or manager</li> <li>• preparing a hazard identification list</li> <li>• looking at the types of exposure to the hazards to assess the risks</li> <li>• removing the hazard from the workplace</li> <li>• substituting the hazard with something of less risk</li> <li>• mechanical control, for example supplying a mechanical aid such as document holder for word processors</li> <li>• administrative or management control, for example training employees to avoid eye strain by taking regular breaks from data entry/word processing</li> <li>• setting up the workstation correctly using ergonomic principles</li> </ul>
<p><b>Workplace procedures for dealing with accidents, fire and other emergencies may include:</b></p> <ul style="list-style-type: none"> <li>• reporting (the accident etc) to the appropriate person</li> <li>• following the enterprise's fire plan</li> <li>• following the OHS policies</li> <li>• administering first aid</li> <li>• following instructions issued by the appropriate person</li> <li>• evacuating the building</li> <li>• assembling outside the building at a designated assembly point</li> <li>• checking that everyone has left the building</li> </ul>
<p><b>The appropriate person may include:</b></p> <ul style="list-style-type: none"> <li>• the first aid officer</li> <li>• the fire warden</li> <li>• OHS representative</li> <li>• <i>designated personnel</i> within the enterprise who have been given specific areas to manage in case of an emergency</li> <li>• the supervisor/manager</li> </ul>
<p><b>The scope of responsibilities may include:</b></p> <ul style="list-style-type: none"> <li>• knowing own role within the enterprise</li> <li>• knowing the role of others within the enterprise</li> <li>• knowing ergonomic principles</li> </ul>
<p><b>OHS issues may include:</b></p> <ul style="list-style-type: none"> <li>• activities and tasks performed in relation to the nature of the enterprise</li> <li>• work and the work environment causing illness, injury or stress</li> </ul>

Range of Variables
<p><b>Relevant OHS legislation may include:</b></p> <ul style="list-style-type: none"><li>• state, territory and federal Acts and laws</li><li>• OHS Codes of Practice in each state and territory</li></ul>
<p><b>Contributions to OHS management may include:</b></p> <ul style="list-style-type: none"><li>• recognising hazards and potential risks</li><li>• reporting hazards and potential risks to the appropriate person</li><li>• preventing hazards and potential risks</li></ul>



**Evidence Guide****Critical aspects:**

- symbols used for occupational health and safety signs are identified
- evidence of understanding of symbols used for OHS signs is required
- occupational health and safety hazards are identified and understood including:
  - types of possible injuries or illnesses
  - situations or events that may give rise to the illness or injuries
- competency is demonstrated in the context of provision to employees of clear directions and information regarding OHS legislation, codes of practice, *workplace procedures* and work instructions.
- enterprise occupational health and safety officer is identified
- hazard is reported to occupational health and safety supervisor according to *enterprise policies and procedures*
- reported hazards are monitored
- hazard is reported again if it has not been rectified within *designated timelines*
- *enterprise policies and procedures* for controlling risks are followed
- *enterprise policies and procedures* for dealing with accidents, fire and emergencies are identified and followed
- occupational health and safety issues are raised with *designated person*
- own work station complies with occupational health and safety standards
- demonstrates knowledge of current ergonomic principles

**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,
- OHS legislation and codes of practice
- safety signage in accordance with state legislation

**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:**

- significant workplace hazards
- meaning of various occupational health and safety signs
- occupational health and safety standards regarding own workstation
- application of a firm's *policies and procedures* required across the full range of tasks covered

##### **Skills:**

- literacy: understands the meaning of occupational health and safety signs; interprets instructions which combine pictorial and written information
- communication: listens to short, explicit instructions to learn new procedures; explains routine procedures to others, eg. workplace safety procedures; participates in workplace meetings by listening for specific information and contributing as appropriate

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



## BSAENT203A Apply knowledge of employee's and employer's rights and responsibilities to workplace environment

This Unit covers the acquisition of knowledge of an employee's and employer's rights and responsibilities. It also addresses issues such as career planning and constructing resumes.

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

Element of Competency	Performance Criteria
Identify <i>workplace rights and responsibilities of employees and employers</i>	<ul style="list-style-type: none"> <li><i>Rights and responsibilities of employees and employers</i> are identified and outlined clearly</li> <li>Self and other's <i>behaviours</i> which contribute to a cooperative team and a safe work environment are identified and practised</li> <li><i>Workplace procedures</i> for upholding employee and employer rights and responsibilities are followed wherever necessary within the scope of responsibilities and competencies</li> </ul>
Identify areas in which discrimination can occur in the workplace	<ul style="list-style-type: none"> <li>Information relating to anti-discrimination is collected, key points are identified and understood</li> <li><i>Avenues for reporting and responding to discrimination</i> are identified and <i>procedures</i> are outlined clearly</li> <li><i>Avenues for resolving disputes</i> within the workplace are identified and procedures for implementing dispute resolutions are outlined clearly</li> </ul>
Prepare documentation covering workplace terms and conditions	<ul style="list-style-type: none"> <li>Documents outlining workplace <i>working conditions</i> are located, summarised and any uncertainties are clarified with appropriate personnel</li> <li><i>Different terms</i> under which persons can be employed are identified and understood</li> <li>Information from relevant employer and employee support organisations is obtained and key points are identified and understood</li> </ul>

Element of Competency	Performance Criteria
Prepare for change and career advancement in the workplace	<ul style="list-style-type: none"><li>Any changes to workplace work environment are identified and training is sought where necessary</li><li><i>Career information centre</i> is contacted and advice/assistance is obtained where necessary to develop a career plan</li><li>Current skills are identified and skills are matched to relevant careers</li><li>Additional skills required to achieve career advancement are identified</li><li>Options for attaining additional skills are identified and pursued where appropriate</li><li>Up-to-date resume is prepared and produced</li></ul>

**Range of Variables****Rights and responsibilities of employees may relate to:**

- attendance
- punctuality
- obeying lawful orders
- confidentiality and privacy of enterprise, client and colleague's information
- safety and care with respect to OHS
- knowing the terms and conditions of own employment
- the right to union representation
- protection from discrimination and sexual harassment

**Rights and responsibilities of employers include:**

- the right to dismiss you if you (see the Commonwealth *Workplace Relations Act 1996*):
  - commit a criminal offence
  - are negligent, careless or cause an accident
  - commit acts of disloyalty such as revealing confidential information
- responsibility of providing a safe environment free from discrimination and sexual harassment (see relevant State and Commonwealth anti-discrimination legislation)

**Behaviours which contribute to a cooperative team environment may include:**

- discussing and negotiating problems and tasks with other team members
- solving problems as a team
- sharing your knowledge and skills
- listening to the ideas and opinions of others in your team

**A firm's working conditions may cover:**

- hours of work per week
- work overload
- expected starting and finishing times
- overtime conditions
- unpaid overtime
- recreation leave
- sick leave
- professional development
- public holidays
- long service leave
- superannuation arrangements
- use of protective clothing
- compliance with anti-discrimination and relevant OHS legislation

Range of Variables
<b>Different terms under which a person can be employed may include:</b> <ul style="list-style-type: none"><li>• Awards</li><li>• Certified Agreements</li><li>• Australian Workplace Agreements</li><li>• contracts</li></ul>
<b>Support organisations may include:</b> <ul style="list-style-type: none"><li>• Trade Unions</li><li>• Employer Associations</li><li>• Professional Associations</li><li>• The Employment Advocate</li></ul>
<b>Changes to workplace environment may include:</b> <ul style="list-style-type: none"><li>• change to software and hardware</li><li>• changes to workplace equipment, machinery</li><li>• changes to office fit out</li></ul>
<b>Career information may be obtained from:</b> <ul style="list-style-type: none"><li>• libraries and local community centres</li><li>• Centrelink</li><li>• TAFEs, Universities and Secondary Colleges</li><li>• Registered Training Organisations</li><li>• Internet</li><li>• network of friends</li><li>• newspapers</li></ul>
<b>Avenues for attaining additional skills may include:</b> <ul style="list-style-type: none"><li>• on-the-job training</li><li>• taking on additional responsibilities in the workplace</li><li>• completing short/TAFE/university courses</li><li>• volunteer work</li></ul>



### Evidence Guide

**Critical aspects:**

- a *firm's policies and procedures* are understood and followed
- evidence of understanding of own and others workplace roles and responsibilities is demonstrated and can be clearly explained
- behaviours which contribute to a cooperative and safe work environment can be identified and clearly explained
- workplace procedures for upholding employee and employer rights and responsibilities can be identified and clearly explained
- key points in anti-discrimination documents are identified including grounds on which it is illegal to discriminate, terms on which it is illegal to discriminate and avenues for reporting and responding to discrimination
- avenues and procedures for reporting, responding to and resolving discrimination and harassment can be identified
- areas in which it is illegal to discriminate against a person are identified, including identification of how discrimination in the workplace can manifest itself
- information on terms and conditions of employment is gathered and an understanding of its contents is demonstrated
- initiative is taken regarding further training, including self-education and investigating formal courses available
- skills maps matches up current skills with appropriate jobs and identifies additional skills required for career advancement
- candidate's resume is formatted and structured appropriately (i.e. chronological or skills based)
- all documents produced are word processed, self-checked for spelling errors, grammatical mistakes and missing words

**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:

- appropriate legislation and regulations relevant to codes of conduct
- workplace manuals and reference materials such as company policy, procedural manuals and checklists
- appropriate technology such as computers with relevant software

**Consistency in performance:**

This unit of competency will require evidence to be collected across a range of events, dealing with different issues workplace matters, 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
- 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
- simulation
- role-play
- projects/assignments
- third party reports

**Underpinning knowledge and skills**
**Knowledge**

- roles and responsibilities of internal and relevant external individuals/authorities

**Skills**

- literacy: follows *workplace procedures*; follows simple written and verbal instructions; writes summaries and prepares resumes
- research: locates relevant documents regarding workplace conditions and summarises for own and other's information
- problem solving: identifies avenues for resolving discrimination and disputes; analyses current personal skills; identifies skill gaps and scope for training; identifies possible career opportunities
- communication: listens to short, explicit instructions to learn new procedures; explains routine procedures to others; participates in workplace meetings by listening for specific information and contributing as appropriate; participates in informal conversations; clarifies when necessary using simple questioning techniques and asks for assistance
- team work: understands team's goals; communicates ideas, information and opinions to the group

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	2	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



**BSATEC201B Select, operate and maintain a range of office  
equipment to complete a range of tasks**

This Unit covers choosing equipment to complete a variety of tasks and includes operating the equipment, undertaking routine maintenance and reporting faults to the appropriate person.

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

Element of Competency	Performance Criteria
Select equipment to be used for the tasks	<ul style="list-style-type: none"><li>• Equipment selected is appropriate for the task to be undertaken</li><li>• Equipment is checked for availability of use by operator</li></ul>
Operate equipment	<ul style="list-style-type: none"><li>• Equipment is used in accordance with instructions</li><li>• A range of equipment functions are used</li><li>• Shutdown procedures are followed, as appropriate</li></ul>
Identify and/or rectify minor faults	<ul style="list-style-type: none"><li>• Routine maintenance is undertaken to ensure equipment meets specifications of manufacturer</li><li>• Equipment faults are accurately identified</li><li>• Action is taken to ensure equipment is repaired in accordance with instructions</li><li>• Repairs outside operator's area of responsibility are reported to the <i>nominated person/section</i> for rectification</li></ul>

Range of Variables
<p><b>Appropriate equipment may include:</b></p> <ul style="list-style-type: none"><li>• photocopier</li><li>• computer</li><li>• printer</li><li>• binder</li><li>• shredder</li><li>• answering machine</li><li>• fax machine</li><li>• telephone</li><li>• overhead projector</li><li>• mail-handling equipment</li></ul>
<p><b>Checking for availability may include:</b></p> <ul style="list-style-type: none"><li>• checking priority access</li><li>• checking equipment bookings</li><li>• restrictions on level of usage</li></ul>
<p><b>Equipment instructions may include:</b></p> <ul style="list-style-type: none"><li>• manufacturers' guidelines</li><li>• procedures manual</li><li>• training notes</li></ul>
<p><b>Range of equipment functions may include:</b></p> <ul style="list-style-type: none"><li>• colour reproduction</li><li>• enlargement and reduction of document</li><li>• double-sided copying</li><li>• automatic paper type or paper size selection</li><li>• stapling</li><li>• automatically folding documents</li><li>• putting postage mark on envelope</li><li>• putting calls on hold</li><li>• memory dialing (speed dialing, re-call, call back)</li><li>• redialing</li><li>• transferring calls</li><li>• hands free communication</li><li>• internal telephone paging system</li><li>• group calls (conference calls)</li><li>• storing faxes in memory</li><li>• confirmation of transmission</li></ul>

**Range of Variables****Shutdown procedures may include:**

- exit all applications
- checking which equipment needs to be switched off
- switching off power at the mains
- resetting, clearing functions selected

**Routine maintenance may include:**

- adding toner
- cleaning equipment regularly
- replacing paper
- periodic cleaning
- replacement of worn-out or defective parts
- clearing paper jams
- organising service calls
- reorganising electronic files

**Equipment faults may include:**

- 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

**Actions taken to repair equipment may include:**

- following manufacturer's guidelines
- following procedures manual
- fixing minor faults within scope of own responsibility
- consulting with service centre for fault repair instructions
- referring fault to appropriate internal/external experts

***Nominated person/ section may include:***

- direct supervisor
- office manager
- IT manager
- maintenance department
- external supplier

### Evidence Guide

**Critical aspects:**

- understanding of the various functions of office equipment is demonstrated
- appropriate equipment for given task is identified
- equipment is operated correctly using a range of functions
- availability of equipment is checked and others informed if equipment is to be used for extended periods
- equipment that must be shutdown is identified and appropriate shutdown procedures followed
- equipment is returned to appropriate place after use
- equipment is stored according to enterprise and manufacturer's guidelines, as appropriate
- equipment is cleaned using recommended cleaning materials only
- routine maintenance is undertaken according to the appropriate operating manual
- equipment faults are identified
- faulty equipment is investigated and fixed or reported if necessary
- faults are recorded in fault log book according to enterprise *policies and procedures*
- all maintenance and repairs are completed in accordance with manufacturer's guidelines
- repairs outside own area of responsibility are reported to *nominated person/section*

**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.



### 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**

- 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
- copyright regulations
- Occupational Health and Safety procedures

**Skills**

- literacy: reads enterprise's *procedures* with regards office equipment; follows sequenced instructions regarding equipment use; interprets information from an appliance manual containing visual or diagrammatic data
- problem solving: selects appropriate functions; determines appropriate fault repair actions
- communication; listens to short, explicit instructions regarding use of equipment in the workplace; performs a series of routine tasks given clear directions; explains routine procedures to others; expresses an opinion, eg. suggests improvements to workplace equipment
- repairs routine equipment faults
- operates a range of office equipment

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

## BSATEC202B Operate a computer to gain access to and retrieve data

This Unit covers using a keyboard to use standard software to open, print, 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"><li>• Computer is turned on in accordance with manufacturer's instructions</li><li>• Log-on procedures are followed where necessary</li><li>• Keyboard is operated within <i>designated speed and accuracy requirements</i></li><li>• OHS guidelines relating to screen based equipment and ergonomic workstations are observed</li></ul>
Open file	<ul style="list-style-type: none"><li>• Software appropriate for the task is selected</li><li>• File is correctly identified and opened</li></ul>
Retrieve and print data	<ul style="list-style-type: none"><li>• Data to be retrieved is located within the file</li><li>• Copy of the data is printed as required</li></ul>
Close file	<ul style="list-style-type: none"><li>• File is saved and closed</li><li>• Program is exited in accordance with <i>designated procedures</i></li><li>• Data is stored in accordance with <i>designated procedures</i></li></ul>

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

Range of Variables
<p><b>Printing a copy of the data may include:</b></p> <ul style="list-style-type: none"><li>• choosing what data to print</li><li>• previewing the parts to be printed</li><li>• ensuring margins are correct</li><li>• choosing a printer</li><li>• choosing the number of copies to be printed</li><li>• using the correct paper tray for the particular print job</li><li>• cancelling a print job</li></ul>
<p><b>Saving and closing file may include:</b></p> <ul style="list-style-type: none"><li>• using menu commands</li><li>• using a short cut</li><li>• clicking on an icon on the tool bar</li></ul>
<p><b><i>Designated procedures for exiting programmes may include:</i></b></p> <ul style="list-style-type: none"><li>• manufacturer's guidelines</li><li>• company guidelines</li><li>• a specified order (when shutting down multiple programmes)</li><li>• programmes that should not be shut down</li><li>• ensuring all data is saved before exiting programmes</li></ul>
<p><b>Procedures for storing data may include:</b></p> <ul style="list-style-type: none"><li>• electronic</li><li>• hard copy</li><li>• floppy disk</li><li>• microfiche/microfilm</li><li>• a combination of the above</li></ul>

### 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*
- understanding of the OHS hazards of using a computer is demonstrated and computer is operated the according to OHS requirements
- own workstation complies with OHS requirements
- the different purposes of types of software are identified correctly
- available 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 identifies and opens correct file
- necessary data is retrieved and printed as required within *designated timelines*
- printed data meets requirements including
- correct data
- correct paper
- 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
- 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: reads and understands operating and procedural manuals; chooses and compares appropriate software applications; follows sequenced instructions regarding equipment use
- communication; listens to short, explicit instructions regarding use of equipment in the workplace; performs a series of routine tasks given clear directions; clarifies information in regard to the use of a computer system
- keyboarding and computer 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

## 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



## BSATEC203B Operate a computer to produce simple documents

This Unit covers using a computer to create new files and to create a document. Competency is achieved in this Unit when word processing and one other software application have been achieved.

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

Element of Competency	Performance Criteria
Create file	<ul style="list-style-type: none"><li>• Appropriate software is selected</li><li>• New file is opened and named</li></ul>
Produce document from written text using standard format	<ul style="list-style-type: none"><li>• Keyboard and mouse are operated within the <i>designated speed and accuracy requirements</i></li><li>• Document is produced with the required data</li><li>• Document is produced in the required style and format</li><li>• Document is produced within <i>designated timelines</i></li><li>• Document is saved regularly to avoid loss of data</li><li>• OHS guidelines relating to screen based equipment and ergonomic workstations are observed</li></ul>
Edit information	<ul style="list-style-type: none"><li>• Data to be edited is identified</li><li>• Data is entered, changed or deleted using keyboard/mouse</li><li>• Document is saved regularly to avoid loss of data</li><li>• Edited information is checked against original for accuracy of contents</li><li>• Spelling, grammar and numeric data are checked</li><li>• Draft is proofread prior to print</li></ul>

Element of Competency	Performance Criteria
Use manuals and online help to solve software problems	<ul style="list-style-type: none"><li>• Online help for software programs is used to solve problems</li><li>• Manuals and training notes are used to solve problems</li><li>• User documentation specific to the enterprise is used where provided</li></ul>
Print document	<ul style="list-style-type: none"><li>• Print preview is used to check document for format and layout</li><li>• Adjustments to layout made where necessary to suit printed document</li><li>• Appropriate stationery is loaded into the printer</li><li>• Document is printed as required</li></ul>
Save file and exit system	<ul style="list-style-type: none"><li>• Document is saved</li><li>• File is closed and applications programs are exited without loss of data</li><li>• Backup copies of files are made in accordance with <i>specified procedures</i> if required</li><li>• Disks/data are filed and stored in accordance with <i>enterprise procedures</i></li></ul>

Range of Variables
<p><b>Appropriate software may include:</b></p> <ul style="list-style-type: none"><li>• word processing</li><li>• database</li><li>• spreadsheet</li><li>• presentation/desktop</li><li>• email</li><li>• internet</li><li>• accounting</li></ul>
<p><b>Opening and naming a new file may include:</b></p> <ul style="list-style-type: none"><li>• opening the appropriate software</li><li>• using the new file command</li><li>• using the save file command</li><li>• giving the file an appropriate name</li></ul>
<p><b><i>Designated speed and accuracy requirements may include:</i></b></p> <ul style="list-style-type: none"><li>• efficient use of keyboard/mouse</li><li>• use of keyboard shortcuts</li><li>• touch-typing ability</li><li>• minimum standard set by organisation</li><li>• levels set in government standard (eg. Standards Australia AS 2708-1991 typing speed or AS 3549-1989 typing accuracy)</li><li>• identifying and editing errors as text is keyed in</li></ul>
<p><b>Required data may include:</b></p> <ul style="list-style-type: none"><li>• text</li><li>• numeric data</li><li>• tables</li><li>• charts</li><li>• graphs</li><li>• graphics</li></ul>

Range of Variables
<p><b>Required style and format may include:</b></p> <ul style="list-style-type: none"><li>• type of font</li><li>• size and style of font</li><li>• line spacing</li><li>• paragraph alignment</li><li>• indents and tabs</li><li>• bullets and numbering</li><li>• tables</li><li>• page setup</li><li>• margins</li><li>• headers and footers</li><li>• page numbering</li></ul>
<p><b><i>Designated timelines may include:</i></b></p> <ul style="list-style-type: none"><li>• deadline agreed with supervisor</li><li>• deadline agreed with internal/external client</li></ul>
<p><b>Saving regularly may include:</b></p> <ul style="list-style-type: none"><li>• at specified time intervals</li><li>• after a specified amount of typing has been completed</li><li>• utilising the computer's AutoSave command</li><li>• saving on to disk</li><li>• saving on to hard drive</li><li>• making back up copies</li></ul>
<p><b>OHS guidelines may include:</b></p> <ul style="list-style-type: none"><li>• equipment and posture</li><li>• layout of workstation</li><li>• radiation from computer screens</li><li>• lighting</li><li>• noise</li><li>• length of work period</li></ul>
<p><b>Editing data may include:</b></p> <ul style="list-style-type: none"><li>• deleting text</li><li>• inserting text</li><li>• rearranging text</li><li>• amending text</li><li>• applying formatting</li></ul>

Range of Variables
<b>Checking accuracy of contents may include:</b> <ul style="list-style-type: none"><li>• ensuring the document is easy to read and understand</li><li>• ensuring the intended meaning of the document is clear</li><li>• ensuring instructions with regard to content and format have been followed</li><li>• forwarding the document to supervisor for feedback</li></ul>
<b>Checking spelling, grammar and numeric data may include:</b> <ul style="list-style-type: none"><li>• reading through the document</li><li>• using a dictionary or thesaurus</li><li>• using a calculator</li><li>• closely comparing the original document to the one created to make sure there are no differences</li><li>• forwarding the document to supervisor for feedback</li></ul>
<b>Proofreading may include:</b> <ul style="list-style-type: none"><li>• checking for accuracy of spelling, punctuation and grammatical mistakes</li><li>• checking numerical data is correct</li><li>• checking that text or data taken from notes or another document has been copied accurately</li><li>• checking that formatting is correct and consistent</li></ul>
<b>Accessing on-line help may include:</b> <ul style="list-style-type: none"><li>• using the computer's help function</li><li>• using the contents tab</li><li>• using the index tab</li><li>• using the find tab</li><li>• using on-line tutorials, templates and wizards</li></ul>
<b>Utilising user manuals and training notes may include:</b> <ul style="list-style-type: none"><li>• knowing where to find appropriate software manuals</li><li>• locating explanations of how to use the application</li><li>• using the index for particular problems</li><li>• working through manuals, notes and tutorials to learn the features of an application</li></ul>
<b>Organisation's procedures manual may include:</b> <ul style="list-style-type: none"><li>• preferred styles, templates and layouts</li><li>• making regular backup copies</li><li>• specific instructions for rectifying problems</li><li>• reporting software problems to a specified person</li><li>• customised computer manuals</li></ul>

Range of Variables
<p><b>Checking document format and layout may include:</b></p> <ul style="list-style-type: none"><li>• checking format and layout is appropriate for message</li><li>• checking format and layout is consistent with organisation's preferred style</li><li>• checking format and layout is consistent with original</li><li>• checking format and layout is appropriate for type of document and audience</li></ul>
<p><b>Adjusting layout to suit printed document may include:</b></p> <ul style="list-style-type: none"><li>• letter format</li><li>• memos</li><li>• faxes</li><li>• invoices</li><li>• report format</li><li>• tables and graphs</li><li>• email</li><li>• margins</li><li>• headers and footers</li></ul>
<p><b>Appropriate stationery may include:</b></p> <ul style="list-style-type: none"><li>• letterhead</li><li>• plain paper</li><li>• coloured paper</li><li>• draft quality paper</li></ul>
<p><b>Printing a document may include:</b></p> <ul style="list-style-type: none"><li>• previewing the document</li><li>• checking the printer has appropriate paper (type and quantity)</li><li>• selecting the print command</li><li>• choosing which printer to use</li><li>• choosing which pages are to be printed</li><li>• selecting the number of copies required</li></ul>
<p><b>Appropriate directory or folder may include:</b></p> <ul style="list-style-type: none"><li>• personal folder</li><li>• general enterprise directory</li><li>• specified directory, (eg. labeled by topic)</li><li>• computer drive (eg. hard drive, floppy drive, network)</li></ul>
<p><b>Closing file and exiting programs may include:</b></p> <ul style="list-style-type: none"><li>• saving documents worked on</li><li>• using the close command</li><li>• closing files from numerous applications used</li><li>• using the exit command</li></ul>

Range of Variables
<p><b><i>Specified procedures may include:</i></b></p> <ul style="list-style-type: none"><li>• organisation policy for backing up work</li><li>• computer user manual for backing up guidelines</li><li>• specific disks and drives</li></ul>
<p><b><i>Enterprise procedures may include:</i></b></p> <ul style="list-style-type: none"><li>• organisation policy for filing document copies</li><li>• filing locations</li><li>• security</li><li>• back up procedures</li><li>• authorised access</li></ul>
<p><b>Equipment used may include:</b></p> <ul style="list-style-type: none"><li>• computers</li><li>• printers</li><li>• disks</li></ul>
<p><b>Software packages may include:</b></p> <ul style="list-style-type: none"><li>• database</li><li>• spreadsheet</li><li>• word processing</li><li>• email</li><li>• internet</li></ul>

### Evidence Guide

**Critical aspects:**

- understanding of a range of software applications is demonstrated
- appropriate software is selected for given task
- new file is created using appropriate functions of software application
- text is keyed accurately within *designated timelines*
- keyboarding speed and accuracy are in accordance with *enterprise policies and procedures*
- a range of keyboard and mouse functions are understood and used
- text is edited correctly using appropriate software application functions and checked against the original document for accuracy of contents
- errors are edited as appropriate
- uses of various standard documents is understood
- documents are created using standard templates
- document is produced according to *enterprise policies and procedures*
- tables, and graphs and other information is inserted as instructed
- text, paragraph and pages are formatted according to *enterprise policies and procedures*
- common editing marks are identified and understood
- document is proofread before printing to ensure that:
  - information is accurate and reflects the given instructions
  - document is free from spelling, grammatical or punctuation errors, abbreviations, insertions or omissions
  - numerical data is accurate
  - format and style is consistent and appropriate throughout the document
- problems are solved using relevant manuals, on-line help and training notes
- before printing, file is previewed and adjustments to layout are made where necessary
- file is printed correctly including selecting the correct paper and appropriate printer
- wastage of paper is minimised with the impact on the environment underpinning office administration procedures
- new files are named and saved logically according to *enterprise policies and procedures*
- back-up copies of files are made according to *enterprise policies and procedures*
- when finished working on a document, document is saved and application is closed and exited according to *enterprise policies and procedures*
- disks are filed/stored securely according to *enterprise policies and procedures*
- any difficulties are reported to *designated person* as necessary
- all tasks are carried out according to *enterprise OHS guidelines*

**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



**Evidence Guide****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

**Recording assessment**

If this unit is successfully assessed the recording of this assessment will include "Operate a computer to produce simple documents (PRODUCTS & VERSIONS)"

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

- enterprise policies and procedures
- using a range of software applications
- using a range of functions of computer equipment
- enterprise style guide/manual
- location of templates
- backup procedures

**Skills**

- literacy: uses the word processing program on a computer to produce own texts; follows sequenced instructions regarding document presentation; selects correct organisational form letters and templates when drafting correspondence; proofreads and edits own writing to check clarity of meaning, conforms to organisational presentation requirements; spells most routine workplace vocabulary with reasonable accuracy; uses punctuation as an aid to understanding
- problem solving: follows relevant manuals
- communication; listens to short, explicit instructions regarding use of equipment in the workplace; performs a series of routine tasks given clear directions; clarifies information in regard to the use of a computer system
- numeracy: collates and copies documents
- keyboarding and computers

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



## BSATEC204B Organise the copying and collating of documents

This Unit covers organising and completing the copying and collating of documents using the appropriate media and materials.

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

Element of Competency	Performance Criteria
Select appropriate media	<ul style="list-style-type: none"><li>• Appropriate media and materials are identified and selected for the task</li></ul>
Copy and collate documents	<ul style="list-style-type: none"><li>• Quantities and resources are correctly estimated to complete the task</li><li>• Documents are copied to the <i>designated standard</i> for presentation</li><li>• Copies are collated in accordance with <i>designated specifications</i> and bound, if necessary</li><li>• Task is completed within <i>designated timelines</i></li></ul>
Distribute documents	<ul style="list-style-type: none"><li>• Completed documents are despatched to the <i>nominated person/section</i> for distribution within <i>designated timelines</i></li><li>• Original documents are filed to ensure integrity and security of contents</li></ul>

Range of Variables
<p><b>Appropriate media and materials may include:</b></p> <ul style="list-style-type: none"> <li>• colour of paper</li> <li>• size, weight and thickness of paper</li> <li>• texture and quality of paper</li> <li>• transparencies</li> <li>• cardboard</li> <li>• envelopes</li> <li>• folders</li> <li>• brochures</li> </ul>
<p><b>Quantities and resources may include:</b></p> <ul style="list-style-type: none"> <li>• number of copies required</li> <li>• amount of materials required</li> <li>• extra materials for back-up</li> <li>• staples, paper clips</li> <li>• spiral combs</li> <li>• availability of photocopier/ binder and other equipment</li> </ul>
<p><b>Equipment used may include:</b></p> <ul style="list-style-type: none"> <li>• printer</li> <li>• photocopier</li> <li>• binder</li> <li>• guillotine</li> <li>• franking machine</li> <li>• paper folding machine</li> </ul>
<p><b><i>Designated standard for presentation may include:</i></b></p> <ul style="list-style-type: none"> <li>• spiral bound copy</li> <li>• cardboard folder</li> <li>• single sided or double sided copying</li> <li>• overhead transparencies</li> <li>• electronic format</li> <li>• enlarged document layout</li> <li>• plastic sheet protectors</li> <li>• according to enterprise templates/style guide</li> </ul>
<p><b><i>Designated specifications for collation may include:</i></b></p> <ul style="list-style-type: none"> <li>• pages clipped, stapled or bound together</li> <li>• materials collated in specific order</li> <li>• use of a photocopier sorter trays</li> <li>• distribution method</li> </ul>

Range of Variables
<p><b><i>Designated timelines may include:</i></b></p> <ul style="list-style-type: none"><li>• deadline agreed with supervisor</li><li>• deadline agreed with internal/external client</li><li>• deadline set in relation to availability of equipment, dispatch requirements</li></ul>
<p><b><i>Nominated person/section may relate to:</i></b></p> <ul style="list-style-type: none"><li>• personal delivery</li><li>• organisation's internal mail system</li><li>• surface mail system</li><li>• post office</li><li>• courier</li><li>• internal/external client</li><li>• mail house</li></ul>
<p><b>Filing to ensure integrity and security of documents may include:</b></p> <ul style="list-style-type: none"><li>• confidential stamp</li><li>• copy only stamp</li><li>• copy and original filed together</li><li>• documents held together securely</li><li>• storing documents in central filing system</li><li>• storing copies of documents</li></ul>

**Evidence Guide****Critical aspects:**

- media and materials selected are appropriate for the task
- task is planned and quantities and resources, including time, are estimated correctly
- documents prepared are copied/printed accurately
- wastage of paper is minimised with the impact on the environment underpinning office administration procedures
- equipment is operated according to manufacturer's instructions
- standard of presentation is appropriate for task and is in accordance with enterprise *policies and procedures*
- collated material is bound, if necessary, according to *designated specifications*
- documents are copied and collated within *designated enterprise timelines*
- all tasks are completed within *designated timelines*
- collated material is checked before distribution to ensure materials have been collated correctly
- materials are distributed to nominated person/section according to *enterprise policies and procedures*
- distributed material is recorded, if necessary, according to *enterprise policies and procedures*
- original materials are filed in correct location and sequence according to *enterprise policies and procedures*, if 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:

- workplace manuals and reference materials such as equipment user manuals, company policy, procedural manuals
- photocopier
- equipment (eg. printer, computer, binder, franking machine)
- materials (eg. paper, card, envelopes)
- filing system

**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/assignment
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

**Underpinning knowledge and skills**
**Knowledge**

- enterprise *policies and procedures*
- relevant legislation (eg. copyright)
- instructions (eg. manufacturer's guidelines, procedural manual, training notes)
- functions of copying, collating, binding and other equipment

**Skills**

- literacy: reads and understands *enterprise policies and procedures*; follows sequenced instructions regarding document presentation; interprets instructions which combine pictorial and written information
- numeracy: has basic mathematical knowledge; collates and counts; files documents
- communication skills; listens to short, explicit instructions regarding document preparation; performs a series of routine tasks given clear directions; asks questions to clarify information
- problem solving: selects appropriate functions
- range of functions of the photocopier

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

**BSAORG201B Organise own work schedule to achieve designated team/section goals**

This Unit covers prioritising and completing allocated tasks within timelines.

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

Element of Competency	Performance Criteria
Organise own work schedule	<ul style="list-style-type: none"><li>• Tasks are identified and prioritised</li><li>• Tasks are broken down into smaller achievable components</li><li>• Resources required to complete the tasks are selected and checked</li><li>• Tasks and priorities are reviewed with a change of instruction from a <i>nominated officer</i></li></ul>
Complete own work schedule	<ul style="list-style-type: none"><li>• <i>Normal office procedures</i> are followed in the organisation and completion of <i>routine tasks</i></li><li>• Tasks are completed satisfactorily within <i>designated timelines</i></li><li>• Routine problems are identified, options are assessed and solutions are implemented</li></ul>

Range of Variables
<b>Enterprise policies and procedures may relate to:</b> <ul style="list-style-type: none"><li>• setting goals that reflect those of the enterprise</li><li>• reporting arrangements</li><li>• standard office <i>policies and procedures</i> for office tasks such as recording messages and drafting letters</li></ul>
<b>Goals may include:</b> <ul style="list-style-type: none"><li>• individual goals</li><li>• team/section goals</li><li>• enterprise goals</li><li>• formal/informal agreements</li></ul>
<b>Tasks may include:</b> <ul style="list-style-type: none"><li>• clarifying and understanding own position description</li><li>• a range of daily, weekly and monthly tasks</li><li>• listing and/or mapping individual work roles and responsibilities</li></ul>
<b>Resources required may include:</b> <ul style="list-style-type: none"><li>• stationery</li><li>• office equipment and printed material</li><li>• planning tools and people</li><li>• manuals</li><li>• computer software</li></ul>
<b>Reviewing tasks and priorities may include:</b> <ul style="list-style-type: none"><li>• a long-term or short-term basis</li><li>• rearranging work schedule and/or timeline</li><li>• consulting with a supervisor and/or colleague</li><li>• adapting to unexpected change</li></ul>
<b>Nominated officer may include:</b> <ul style="list-style-type: none"><li>• supervisor</li><li>• manager</li><li>• team leader</li></ul>
<b>Normal office procedures may relate to:</b> <ul style="list-style-type: none"><li>• drafting simple correspondence</li><li>• retrieving files</li><li>• recording messages</li><li>• answering the telephone</li><li>• greeting clients</li></ul>

Range of Variables
<b>Routine problems may include:</b> <ul style="list-style-type: none"><li>• paper jam in the photocopier/printer</li><li>• replacing the toner in the photocopier</li><li>• being unable to find a client's file</li></ul>
<b>Assessing options may include:</b> <ul style="list-style-type: none"><li>• evaluating effectiveness of work practices</li><li>• evaluating effectiveness of office procedures</li><li>• proposing alternative task completion methods</li><li>• proposing changes to office procedures</li></ul>
<b>Implementing solutions may include:</b> <ul style="list-style-type: none"><li>• trialing new work practices</li><li>• changing work practices</li><li>• discussing changes to office procedures with colleagues</li></ul>

### Evidence Guide

**Critical aspects:**

- individual and team goals are identified correctly and understood
- individual goals clearly relate to team goals
- the relationship between goals and tasks is understood and demonstrated
- goals are set regularly on a short and long-term basis
- 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
- time-saving resources are gathered as part of the task planning process
- the enterprise's *normal office procedures* for tasks are clearly understood and followed
- the ability to set realistic timelines for the completion of tasks is demonstrated
- a variety of planning tools are utilised to complete tasks within *designated timelines*
- workload is planned for maximum efficiency, including competing demands
- quality of own work performance is regularly monitored
- causes of routine problems that interrupt tasks are clearly understood
- possible solutions for problems are assessed, and the best option is acted upon
- supervisor is consulted when necessary over the best solution to a problem

**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's *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.

### 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's *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 and understands an enterprise's *procedures* and goals; sequences writing with some attention to organising principles of time and importance
- communication: listens for specific information on routine enquiry and follows instructions of several steps; participates in informal conversations; questions to clarify information; consults a supervisor when unsure of a work task or the best solution to a problem
- time-management: achieves work tasks within designated timelines
- self-management: prioritises work tasks
- problem-solving: breaks down tasks and utilises resources efficiently
- teamwork: re-negotiates tasks and adapts to changing work practices
- numeracy: time estimation and accurate planning

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



## BSATEM201B Participate in allocation and completion of team tasks

This Unit covers identifying team goals, working in a team to achieve the goals and completing own tasks 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
Participate in identifying tasks for team	<ul style="list-style-type: none"><li>Goals for the team are identified in conjunction with the team</li><li>Tasks required to achieve goals are identified</li><li>Responsibilities of individuals within the team are allocated in discussion with the team to ensure <i>designated team goals</i> are met</li></ul>
Complete own tasks	<ul style="list-style-type: none"><li>Time and resources needed to complete tasks are estimated correctly</li><li>Responsibilities are renegotiated to meet changes in the workplace</li><li>Assistance is sought from other team members when difficulties arise in achieving allocated tasks</li><li>Allocated tasks are completed within <i>designated timelines</i></li><li>Information and feedback provided by others in the team are acknowledged</li></ul>
Assist others to complete team tasks	<ul style="list-style-type: none"><li>Support is provided to colleagues to ensure <i>designated team goals</i> are met</li><li>The team's performance is evaluated according to its goals</li></ul>

Range of Variables
<p><b>Team goals may include:</b></p> <ul style="list-style-type: none"><li>• own team</li><li>• section</li><li>• enterprise</li></ul>
<p><b>Identifying team goals in conjunction with the team may include:</b></p> <ul style="list-style-type: none"><li>• team leader/team members' clarification of the team's goals</li><li>• team discussion of the <i>team's goals</i></li><li>• identifying smaller, more specific goals to meet the team's overall goal</li></ul>
<p><b>Tasks may include:</b></p> <ul style="list-style-type: none"><li>• activities to achieve team goals</li><li>• group/team tasks</li><li>• individual tasks</li></ul>
<p><b>Identifying tasks may include:</b></p> <ul style="list-style-type: none"><li>• team leader identifying tasks and informing the team</li><li>• team leader preparing a draft list of tasks and discussing with the team</li><li>• the team discussing and identifying tasks as a group</li><li>• brainstorming</li><li>• seeking information from internal clients and other teams</li></ul>
<p><b>Allocating responsibilities may include:</b></p> <ul style="list-style-type: none"><li>• team discussion regarding allocation of tasks</li><li>• considering the skills of different team members</li><li>• considering the skill gaps</li><li>• considering team member commitments</li><li>• team allocation of responsibilities</li></ul>
<p><b>Estimating the time needed to complete tasks may include:</b></p> <ul style="list-style-type: none"><li>• planning</li><li>• long-term work schedule</li><li>• daily work schedule</li><li>• checking deadlines</li><li>• availability of resources</li></ul>

Range of Variables
<p><b>Resources may relate to:</b></p> <ul style="list-style-type: none"><li>• time</li><li>• people</li><li>• budgets</li><li>• photocopier</li><li>• stationery (bulldog clips, staples and stapler, notepad, paper clips, photocopying paper)</li><li>• promotional material</li><li>• computer access</li><li>• human resources</li><li>• internal (additional assistance)</li><li>• external (expert or specialised advice/knowledge)</li></ul>
<p><b>Renegotiating responsibilities may include:</b></p> <ul style="list-style-type: none"><li>• team progress meetings</li><li>• reorganising/changing responsibilities if necessary</li><li>• reallocating tasks</li><li>• prioritising</li><li>• changing deadlines in consultation with the team</li><li>• considering changing circumstances in relationship to team commitments and priorities</li></ul>
<p><b>Changes in the workplace may include:</b></p> <ul style="list-style-type: none"><li>• changing priorities</li><li>• team members being co-opted</li><li>• absence of team member</li><li>• equipment break-down</li><li>• lack/short supply of resources</li></ul>
<p><b>Difficulties that occur may include:</b></p> <ul style="list-style-type: none"><li>• equipment breakdowns (eg. computer crashes, photocopier breaks down, facsimile malfunction)</li><li>• insufficient resources (stationery shortage, staff shortage)</li><li>• extra responsibilities</li><li>• changing goals and priorities</li><li>• unexpected delays</li></ul>
<p><b>Designated timelines may include:</b></p> <ul style="list-style-type: none"><li>• personal deadlines</li><li>• timelines allocated in discussion with the team leader</li><li>• timelines agreed upon in discussion with the team members</li><li>• client negotiated timelines</li></ul>

Range of Variables
<p><b>Feedback and information may relate to:</b></p> <ul style="list-style-type: none"> <li>• assisting a colleague</li> <li>• clarifying the enterprise's preferred task completion methods</li> <li>• monitoring completion of colleagues' tasks</li> <li>• open communication channels</li> <li>• encouraging colleagues</li> <li>• acknowledging satisfactory performance</li> <li>• acknowledging unsatisfactory performance</li> </ul>
<p><b>Acknowledging feedback may include:</b></p> <ul style="list-style-type: none"> <li>• thanking team member for feedback</li> <li>• clarifying any ambiguous feedback</li> <li>• modifying behaviour with peers</li> <li>• modifying behaviour according to a colleague's or team leader's suggestions</li> <li>• recognising the validity of the feedback received</li> <li>• using feedback to facilitate improvement</li> </ul>
<p><b>Providing support to colleagues may include:</b></p> <ul style="list-style-type: none"> <li>• explaining/clarifying</li> <li>• helping colleagues</li> <li>• problem solving</li> <li>• providing encouragement</li> <li>• providing feedback to another team member</li> <li>• undertaking extra tasks if necessary</li> </ul>
<p><b>Evaluating the team's performance according to its goals may relate to:</b></p> <ul style="list-style-type: none"> <li>• identifying reasons for achievement/non-achievement of team goals</li> <li>• identifying reasons for success/failure of team work</li> <li>• identifying reasons for ease/difficulty in task completion</li> <li>• identifying appropriate/inappropriate allocation of tasks</li> <li>• team's management of changing priorities (eg. work schedule updated to reflect the changes, reallocation of tasks)</li> <li>• identifying improvements in team processes for the future</li> </ul>

**Evidence Guide****Critical aspects:**

- various teams and their functions are correctly identified and can be explained
- participates in formal team communication
- understands team goals and assists others in understanding team goals
- clarification is sought as required
- participates in identification of tasks required to achieve team goals
- participates in task allocation process to ensure tasks allocated are appropriate
- if allocated tasks are outside skill area, training is sought as required
- communicates with team members informally as required to ensure completion of team tasks
- demonstrates understanding of relationship of individual tasks to the team's tasks
- plans work to ensure timely completion of tasks
- demonstrates commitment to team goals and achievement of individual and team tasks
- actively cooperates with other team members and demonstrates flexibility
- resources required to achieve own tasks are identified and secured with assistance if necessary
- allocated tasks are completed within *designated timelines*
- any difficulties in achieving tasks are acknowledged and appropriate assistance is sought promptly
- participates in renegotiation of individual and team tasks as required
- participates in providing feedback to and receiving feedback from the team
- participates in evaluating performance of the team

**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 manuals and reference materials outlining *policies and procedures*
- planning tools
- scheduling tools

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

**Skills**

- literacy: reads and understands *enterprise goals and procedures*; contributes to group writing activity; extracts tasks from a list; follows sequenced written and verbal instructions
- communication: asks questions to clarify meaning when listening or reading; communicates ideas, information and opinions to the group, listens for and notes specific information when making arrangements for group activity; participates in informal conversations
- problem-solving: relies on prior experiences and examples to select appropriate methods
- numeracy: adheres to timelines for group activities; accurate recording and estimation 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	*

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





## BSAFIN201B Prepare and process financial documentation for cash flow and accounting records

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

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

Element of Competency	Performance Criteria
Record and balance petty cash transactions	<ul style="list-style-type: none"> <li>Petty cash vouchers are prepared</li> <li>Petty cash claims and vouchers are checked for accuracy and authenticity before processing</li> <li>Petty cash transactions are recorded</li> <li>Distribute petty cash according to <i>enterprise guidelines</i></li> <li>Transactions are totalled and the petty cash book is balanced</li> <li>Petty cash book is presented to <i>nominated person/section</i> for checking within <i>designated timelines</i></li> <li>Irregularities are noted and referred to <i>nominated person/section</i> for resolution within <i>designated timelines</i></li> <li>Documents for reimbursement of the petty cash fund are prepared according to <i>enterprise guidelines</i></li> </ul>
Reconcile invoices for payment to creditors	<ul style="list-style-type: none"> <li>Discrepancies between invoices and source documents are identified and reported to <i>nominated person/section</i> for resolution</li> <li>Calculations on invoices are checked and errors identified</li> <li>Errors are reported to <i>nominated person/section</i> for correction/resolution</li> <li>Discrepancies and errors are rectified, as directed</li> <li>Correct and authorised invoices are prepared for payment</li> <li>Creditor enquiries are resolved or referred to <i>nominated person/section</i> for resolution</li> </ul>

Element of Competency	Performance Criteria
Prepare invoices for debtors	<ul style="list-style-type: none"><li>• Calculations are performed to produce accurate invoices</li><li>• Relevant documentation is checked to ensure accuracy of contents</li><li>• Invoices are distributed to <i>nominated person/section</i> for verification prior to being despatched</li><li>• Verified invoices are despatched within <i>designated timelines</i></li><li>• Verified figures are recorded according to <i>enterprise procedures and policies</i></li><li>• Documents are copied and filed for auditing purposes</li></ul>
Prepare and process banking documents	<ul style="list-style-type: none"><li>• Deposits are accurately entered and balanced according to <i>enterprise procedures and policies</i></li><li>• Cheques and credit card vouchers are checked for validity (signatures, dates, amounts) before processing</li><li>• Cash, cheques and credit cards are listed on banking deposit forms in accordance with the banking institution's guidelines</li><li>• Pay-in documentation is reconciled with all money calculations (cash, cheques, credit cards, etc.)</li><li>• Cash, cheques and credit card vouchers are bundled according to bank guidelines</li><li>• Deposits are lodged with the banking institution</li></ul>

Range of Variables
<b>Checking claims and vouchers for accuracy and authenticity may include:</b> <ul style="list-style-type: none"><li>• requiring a receipt</li><li>• ensuring items purchased are business related</li><li>• accepting claims from authorised personnel only</li></ul>
<b>Recording petty cash transactions may include:</b> <ul style="list-style-type: none"><li>• paper-based</li><li>• electronic</li><li>• enterprise accounting system</li></ul>
<b><i>Enterprise guidelines may include:</i></b> <ul style="list-style-type: none"><li>• all cash being accounted for at all times</li><li>• not lending money to colleagues from petty cash fund</li><li>• never leaving petty cash unattended</li><li>• always keeping cash box locked and securely stored</li><li>• keeping key separate from cash box</li></ul>
<b>Totaling and balancing petty cash book may include:</b> <ul style="list-style-type: none"><li>• checking transactions against the amount of cash remaining</li><li>• self checking totals</li></ul>
<b><i>Nominated person/section for checking may include:</i></b> <ul style="list-style-type: none"><li>• petty cash officer</li><li>• supervisor</li><li>• accounts department</li></ul>
<b><i>Designated timelines may include:</i></b> <ul style="list-style-type: none"><li>• petty cash period</li><li>• pay period</li><li>• weekly, fortnightly, monthly</li></ul>
<b><i>Enterprise guidelines may include:</i></b> <ul style="list-style-type: none"><li>• Australian Accounting and Auditing Standards</li><li>• format of documents for reimbursement</li><li>• updating receipt(s)</li></ul>

Range of Variables
<b>Business source documents may include:</b> <ul style="list-style-type: none"><li>• requisition/purchase orders</li><li>• delivery dockets</li><li>• invoices</li><li>• credit notes</li><li>• remittance advice</li></ul>
<b>Checking for and identifying errors may include:</b> <ul style="list-style-type: none"><li>• checking goods against delivery docket and purchase order</li><li>• ensuring quantities are correct as ordered</li><li>• ensuring goods are in good condition</li><li>• accuracy of calculations, order details and extensions</li></ul>
<b>Rectifying discrepancies and errors may include:</b> <ul style="list-style-type: none"><li>• marking error on invoice</li><li>• informing direct supervisor</li><li>• informing supplier</li><li>• direction to correct error on invoice</li><li>• requesting the supplier to issue a credit note</li><li>• credit note/new invoice issued for amount of error</li></ul>
<b>Preparing for payment may include:</b> <ul style="list-style-type: none"><li>• bundling all checked documentation together</li><li>• preparing cheque for amount owed</li><li>• signatories checking validity of documentation</li><li>• authorised personnel signing cheques</li></ul>
<b>Creditor enquiries may include:</b> <ul style="list-style-type: none"><li>• overdue account</li><li>• returned goods</li><li>• discount details</li><li>• incorrect payment</li></ul>
<b><i>Nominated person/ section</i> for resolution may include:</b> <ul style="list-style-type: none"><li>• supervisor</li><li>• authorised enterprise signatories</li><li>• accounts department</li></ul>

Range of Variables
<p><b><i>Relevant documentation may include:</i></b></p> <ul style="list-style-type: none"> <li>• purchase order</li> <li>• delivery docket</li> <li>• invoice</li> <li>• credit notes</li> <li>• receipts</li> </ul>
<p><b><i>Checking accuracy of contents may include:</i></b></p> <ul style="list-style-type: none"> <li>• double checking and cross checking all codes, quantities and calculations</li> <li>• checking enterprise discount policies and procedures</li> <li>• correct delivery address and contact person</li> <li>• sales tax exemptions</li> <li>• requested delivery date</li> </ul>
<p><b><i>Nominated person/ section for verification may include:</i></b></p> <ul style="list-style-type: none"> <li>• direct supervisor</li> <li>• accounts department</li> <li>• store person</li> </ul>
<p><b><i>Despatched within designated timelines may include:</i></b></p> <ul style="list-style-type: none"> <li>• enterprise deadline</li> <li>• after credit check</li> <li>• client deadline</li> <li>• carrier deadline</li> </ul>
<p><b><i>Recorded according to enterprise procedures and policies may include:</i></b></p> <ul style="list-style-type: none"> <li>• keeping all relevant documentation together</li> <li>• entering customer data onto computer</li> </ul>
<p><b><i>Documents are copied and filed may include:</i></b></p> <ul style="list-style-type: none"> <li>• all relevant documentation photocopied/or carbon copies kept</li> <li>• filing copies of invoices in specified manner (alphabetically, numerically or according to customer code)</li> <li>• any enquiries from client filed with relevant invoice or entered onto computer based customer file</li> </ul>
<p><b><i>Enterprise procedures and policies for entering and balancing deposits may include:</i></b></p> <ul style="list-style-type: none"> <li>• Australian Accounting and Auditing Standards</li> </ul>

Range of Variables
<p><b>Checking validity of cheques and credit card vouchers may include:</b></p> <ul style="list-style-type: none"><li>• date of the cheque</li><li>• amount in words and figures match</li><li>• the payee is spelt correctly</li><li>• cheque is signed by drawer</li><li>• cheque is marked not negotiable</li><li>• name and address of drawer written on the back of the cheque</li><li>• any alterations initialled by the drawer</li><li>• amount being paid is amount owed</li><li>• reporting discrepancies to direct supervisor</li><li>• check against list of stolen card numbers</li><li>• obtain authorisation and record authorisation number on card voucher</li><li>• check customer's signature</li><li>• check expiry date</li><li>• check card holder name</li><li>• give customer copy of voucher and keep remaining voucher copies</li><li>• correct discount amounts have been deducted</li></ul>
<p><b>Banking institution's guidelines may include:</b></p> <ul style="list-style-type: none"><li>• deposit slips filled out accurately</li><li>• cash bundled</li><li>• banking summary provided</li><li>• banking electronically</li></ul>
<p><b>Reconciling pay-in documentation may include:</b></p> <ul style="list-style-type: none"><li>• checking banking summary total against cash, cheques and credit card vouchers</li><li>• verification by supervisor/ accounts department</li><li>• reporting any discrepancies/anomalies</li></ul>
<p><b>Cash, cheques and credit card vouchers are bundled and deposited may include:</b></p> <ul style="list-style-type: none"><li>• all details of cash transactions recorded on bank deposit slip</li><li>• cash grouped into denominations</li><li>• coins deposited in plastic banking bags</li><li>• printing out a banking deposit slip from accounting package</li><li>• banking of credit card vouchers within three working days from date of transaction</li><li>• banking electronically</li><li>• filling out forms (eg. telephone credit card payment summary form)</li></ul>

### Evidence Guide

**Critical aspects:**

- documents relating to financial activities are identified correctly
- the main source documents required are identified correctly and their purpose is accurately understood
- when dealing with petty cash, *enterprise policies and procedures* are followed at all times
- all petty cash claims are checked for accuracy and legitimacy
- all vouchers are written accurately into the petty cash book at the end of the period
- transactions are totalled and the petty cash book is balanced
- the petty cash book is presented to *appropriate person* for verification
- petty cash reimbursement cheque is prepared correctly
- purchase orders are prepared correctly, supplier receiving one copy, one copy retained
- requisition form is prepared if necessary and sent to the purchasing officer
- delivered goods are checked against the delivery docket and the purchase order to ensure all quantities are correct as ordered and the goods are in good condition
- 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
- invoices are paid, discounts are deducted according to *enterprise policies and procedures*
- cheques are prepared correctly
- all relevant documentation is attached to cheque before signing for signatories' approval
- incorrect cheques are cancelled according to *enterprise policies and procedures*
- cheque books are stored in a secure location according to *enterprise policies and procedures*
- when purchase order is received, invoice and delivery docket are correctly prepared
- when preparing invoices, all codes and calculations are checked and are accurate
- invoices are prepared within *designated timelines*
- purchase order, delivery docket and invoice are grouped together and presented to *appropriate person* for identification
- all invoices are copied and filed according to *enterprise policies and procedures*
- receipts are prepared correctly according to *enterprise policies and procedures*
- banking documents are filled out correctly and cash, cheques and credit card slips are bundled according to the bank's requirements
- banking security procedures are followed at all times
- all cheques received are checked for their accuracy and validity
- deposit slips are completed correctly
- when receiving payment by credit card, ensures that the card has not been stolen or reported
- credit card authorisation is obtained according to *enterprise policies and procedures*
- expiry date is checked to ensure card is valid
- customer is given copy of voucher and remaining copies are kept
- cash is bundled according to bank's requirements
- credit card vouchers, sales voucher and credit vouchers are banked within *designated timelines*
- any discrepancies or irregularities are reported to an *appropriate authority*

**Evidence Guide****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/petty cash books
- receipts
- invoices
- delivery dockets
- deposit slips
- credit notes
- purchase orders
- cheques
- invoices

**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 in relation to all given tasks
- simple calculations
- credit card procedures

**Skills:**

- literacy: reads and understands an enterprise's simple financial procedures; follows sequenced verbal and written instructions
- numeracy: calculates with time; uses knowledge of mathematical concepts
- orders and groups number, shape, data and measurement explaining any simple relationships or patterns; interprets, compares and calculates with natural numbers and money
- communication: listens to and follows oral instructions; questions to clarify information
- proofreading: checks and calculates data
- problem solving: draws on relevant experience to check that the outcome fits the activity

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

## BSAMED201A Use basic medical terminology in order to communicate with patients, fellow workers and health professionals

This Unit covers understanding and responding to instructions, carrying out routine tasks and communicating with a range of internal/external clients in a Medical Office, using appropriate basic medical terminology.

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

Element of Competency	Performance Criteria
Respond appropriately to instructions which contain basic medical terminology	<ul style="list-style-type: none"><li>• Written and oral instructions using basic medical terminology are received, understood and documented</li><li>• Checklists are used where appropriate</li><li>• Abbreviations for commonly used medical terms and associated processes are understood</li><li>• The <i>policies and procedures</i> of the medical practice are understood and adhered to</li><li>• Clarification is sought where necessary</li></ul>
Carry out routine tasks	<ul style="list-style-type: none"><li>• Basic medical terminology is used correctly in the completion of <i>routine tasks</i></li><li>• Assistance is sought from <i>designated person</i> as required</li></ul>
Use appropriate basic medical terminology in oral and written communication with patients, fellow workers and health professionals	<ul style="list-style-type: none"><li>• Appropriate basic medical terminology is used as directed in oral communication with patients, fellow workers and health professionals</li><li>• Appropriate basic medical terminology is used as directed in written communication with patients, fellow workers and health professionals</li><li>• Basic medical terminology is spelt and pronounced correctly</li><li>• Advice is sought from <i>designated person</i> with regard to basic medical term/s and accompanying process/es</li></ul>

**Range of Variables****Basic medical terminology may include:**

- knowledge of the fundamental word structure used in medical terms
- basic systems of the body (eg. skeletal, respiratory, cardiovascular, lymphatic)
- parts of the body
- interrelated functions of the body, locations and diseases (eg. functions of the skeletal system, locations of skeletal injuries, skeletal diseases)
- common medical conditions
- medical investigations and procedures
- injuries
- common abbreviations for medical and pharmacological terms (eg. BCG, HRT, IVP, tab, ante, ung)
- commonly used medical equipment and instruments
- departments/sections in a hospital
- common medications
- referrals
- medico-legal terminology at basic level

**Written and oral instructions may include:**

- notices
- referrals
- OHS signs and instructions
- diary entries
- telephone calls
- verbal instructions

***Routine tasks may include:***

- entering patient details into computer system
- filing patient notes
- maintaining patient information
- receiving and making telephone calls
- word processing
- processing correspondence
- preparing medical equipment
- storing and maintaining security of drugs
- receiving visitors and patients
- providing basic information to patients
- maintaining information to assist patients
- maintaining reception area, waiting room, consultation room
- ordering stock (eg. stationery and medical supplies)
- recording information
- opening the rooms at start of session
- closing rooms at end of session

**Range of Variables****Oral communication may include:**

- verbal instructions
- confirming appointments
- answering routine telephone patient inquiries
- transferring calls
- paging staff
- interrupting doctor when necessary
- determining the urgency of patient presentations—by telephone or face to face

**Written communication may include:**

- memoranda
- letters
- forms
- routine correspondence
- patient records
- appointment diaries, cards
- telephone messages
- electronic messaging

***Policies and procedures may include:***

- telephone protocol
- correspondence format
- office practice manual
- OHS
- emergency procedures
- security, confidentiality and privacy procedures
- recording information
- cleanliness and hygiene
- accessing and updating files
- information specific to the enterprise
- abiding by local, state and federal legislation
- following instructions
- confidentiality and privacy
- RACGP Code of Practice for the Management of Health Information in General Practice
- RACGP Entry Standards for General Practices

**Clarification may be sought from:**

- medical dictionary
- office practice manual
- relevant handbook
- designated person

**Evidence Guide****Critical aspects:**

- abbreviations for basic medical terms and associated processes are identified and used where appropriate
- basic medical terminology is spelt and pronounced correctly
- routine communication is carried out in a professional manner using appropriate communication strategies, including clear language
- confidentiality, security and privacy of information is maintained
- activities and actions are carried out within local, state and federal legislation
- instructions are followed
- activities are well organised, executed in a timely fashion and any documents prepared or obtained are filed appropriately
- all written communication is self-checked for spelling errors, grammatical mistakes and missing words

**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:

- appropriate legislation and regulations relevant to codes of conduct
- workplace manuals and reference materials such as a medical dictionary, procedural manuals and checklists
- appropriate technology such as computers with relevant software, tape recorder

**Consistency in performance:**

This unit of competency will require evidence to be collected across a range of events, dealing with different issues workplace matters, 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
- 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
- simulation
- role-play
- projects/assignments
- third party reports

**Underpinning knowledge and skills****Knowledge**

- office practice manual
- relevant state/federal legislation
- own and others' responsibilities
- appropriate forms and recording requirements
- appropriate external agencies

**Skills**

- literacy: interprets set procedures, policies, signs and instructions, uses correct spelling, grammar and punctuation
- follows routine oral and written sequenced instructions
- language: relays information, uses appropriate and correct medical terminology, uses correct pronunciation and sentence structures
- communication: listens and questions to clarify terms and context
- interpersonal: interacts with patients and others in an appropriate manner

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



## BSAMED202A Follow OHS policies and procedures in a medical office to ensure own safety and that of others in the workplace

This Unit covers following office OHS policies and procedures, identifying risks and hazards, responding to emergencies and maintaining a safe workplace.

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

Element of Competency	Performance Criteria
Demonstrate familiarity with office practice manual and office policy and procedures	<ul style="list-style-type: none"> <li>• <i>Roles and responsibilities</i> of persons employed in a medical office are identified and understood</li> <li>• Emergency procedures as outlined in practice manual are identified and understood</li> <li>• <i>Policies and procedures</i> in place to protect employees, visitors and patients from accidents in the medical office are identified and understood</li> <li>• The importance of following the practice manual and documenting all activities, actions and outcomes immediately after an occurrence is identified and understood</li> <li>• Assistance is requested and sought where appropriate</li> <li>• Any uncertainties or irregularities are referred to the <i>appropriate person</i> for resolution</li> </ul>
Identify and respond to an emergency	<ul style="list-style-type: none"> <li>• Hazards and emergency situations are identified and responded to according to office <i>policies and procedures</i></li> <li>• Patients, visitor and colleagues requiring urgent medical attention are attended to according to office <i>policies and procedures</i></li> <li>• <i>Appropriate person</i> is contacted promptly and informed of the emergency situation</li> <li>• External authorities are contacted where appropriate and according to office <i>policies and procedures</i></li> <li>• Actions, activities and outcomes are recorded according to legislative requirements and office <i>policies and procedures</i></li> </ul>

Element of Competency	Performance Criteria
Maintain a safe workplace	<ul style="list-style-type: none"><li>• Potential OHS risks and hazards are identified and rectified by self or referred to <i>appropriate person</i> for rectification</li><li>• Any spillages or breakages are cleaned up promptly and according to the office <i>policies and procedures</i></li><li>• Refuse, bodily fluids and waste and potential sources of infection are cleaned up promptly and according to the office <i>policies and procedures</i></li><li>• Dangerous products are stored according to office and manufacturer's instructions</li><li>• Cleaning apparatus are maintained and used according to office and manufacturer's instructions</li><li>• The reception area and work equipment are kept clean and tidy</li><li>• Personal hygiene is maintained</li></ul>

**Range of Variables****Emergency procedures may include:**

- fire drills
- evacuation
- dealing with medical emergencies including psychiatric emergencies
- administering basic first aid

**Policies and procedures may include:**

- emergency procedures including the calling of ambulances
- office practice manual
- OHS policies
- Materials Safety Data Sheets (MSDSs)
- administering first aid and CPR
- re-prioritisation of work
- security, confidentiality and privacy procedures
- recording information
- cleanliness and hygiene
- information specific to the enterprise
- abiding by local, state and federal legislation
- following instructions
- infection control including cleaning and sterilisation of instruments
- RACGP Code of Practice for the Management of Health Information in General Practice
- RACGP Entry Standards for General Practices
- RACGP Sterilisation/Disinfection Guidelines for General Practice
- National Health and Medical Research Council guidelines

**Documenting activities, action and outcomes may include:**

- preparing reports
- recording incidents according to the enterprise's policies and procedures (eg. completing standard forms)
- documenting sterilisation procedures
- documenting vaccine storage

Range of Variables
<p><b>Emergencies, risks and hazards may include:</b></p> <ul style="list-style-type: none"><li>• drug hold-ups, robbery</li><li>• fire</li><li>• bomb threats</li><li>• medical emergencies (eg. falls, bleeding, seizures, fainting, collapses, panic attack, psychosis)</li><li>• injuries (eg. needle stick)</li><li>• spread of infection</li><li>• spillage</li><li>• breakage</li><li>• blood</li><li>• storage of chemicals</li><li>• incorrectly stored chemicals</li><li>• lack of personal hygiene</li><li>• inadequate clothing or safety equipment</li><li>• exposure to hazardous material</li></ul>
<p><b>Appropriate person may include:</b></p> <ul style="list-style-type: none"><li>• supervisor</li><li>• OHS officer</li><li>• practice manager</li><li>• doctor</li></ul>
<p><b>External authorities may include:</b></p> <ul style="list-style-type: none"><li>• Police</li><li>• Ambulance</li><li>• Fire Brigade</li><li>• WorkCover</li></ul>
<p><b>Potential sources of infection may include:</b></p> <ul style="list-style-type: none"><li>• unsterilised/poorly sterilised equipment and work surfaces</li><li>• unwashed hands</li><li>• spillages</li><li>• breakages</li><li>• patients with colds, flu and other infectious diseases</li><li>• used dressings, bandages and equipment</li><li>• sharps (eg. needles, scalpel blades)</li><li>• contaminated waste</li></ul>

**Range of Variables****Dangerous products may include:**

- blood
- vaccines
- specimens
- samples
- drugs
- chemicals
- sharps (eg. needles, scalpel blades )

**Maintaining and using cleaning apparatus may include:**

- maintaining stocks of cleaning equipment (eg. disposable gloves, liquid repellent aprons, disinfectant)
- disposing of spilled substances, dangerous products, 'sharps' and waste correctly
- sterilising and/or disposing of cleaning equipment
- using appropriate cleaning equipment to clean spillages and breakages
- wearing protective clothing, protective eye wear when in contact with body fluids or chemicals that may splash

**Keeping reception area and work equipment clean and tidy may include:**

- keeping access routes clear and free of clutter
- attending to spillages and breakages promptly
- preparing examination rooms for patients
- tidying brochures, magazines and other display materials
- processing patient notes/records/files/reports/results promptly
- placing files in appropriate trays/locations
- cleaning and sanitising floor and bench surfaces
- cleaning and tidying toilets and lunch room
- laundering linen

**Maintaining personal hygiene may include:**

- washing hands
- covering open wounds or abrasions on own body
- wearing gloves when appropriate
- not attending work if ill
- immunisations appropriate for the setting

**Evidence Guide****Critical aspects:**

- practice manual is adhered to
- emergency situations are responded to appropriately
- emergencies are referred to correct internal and external agencies as appropriate
- hazards and risks are correctly identified and responded to accordingly
- correct Fire Plan and evacuation procedures are known and demonstrated
- patients who require urgent medical assistance are attended to promptly and appropriately
- measures are taken to reduce risk of infection
- spillages and breakages are attended to promptly and appropriately
- chemicals and other dangerous substances are handled correctly
- safety equipment is maintained and used
- reception and other areas are cleaned and maintained
- work surfaces and equipment are cleaned and/or sterilised to Australian Standards
- personal hygiene is maintained
- an understanding of the limit of own responsibility is demonstrated
- uncertainties and irregularities are reported to *appropriate person* for resolution
- confidentiality, security and privacy of information is maintained
- activities, actions and outcomes are documented correctly
- activities and actions are carried out within local, state and federal legislation
- instructions are followed
- knowledge of correct documentation requirements is demonstrated
- activities are well organised, executed in a timely fashion and any documents prepared or obtained are filed appropriately

**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:

- appropriate legislation and regulations relevant to codes of conduct
- workplace manuals and reference materials such as an office practice manual, procedural manuals and checklists
- appropriate technology such as computers with relevant software

**Evidence Guide****Consistency in performance:**

This unit of competency will require evidence to be collected across a range of events, dealing with different issues workplace matters, 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
- 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
- simulation
- role-play
- projects/assignments
- third party reports

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

- office practice manual
- procedures manual
- relevant local/state/federal legislation
- own and others' responsibilities
- appropriate forms and recording requirements
- appropriate cleaning and sterilisation techniques and apparatus
- appropriate external agencies
- potential hazards and risks
- dangerous products

**Skills**

- literacy: interprets set procedures and policies; understands the meaning of occupational health and safety signs; interprets instructions which combine pictorial and written information
- language: relays information, uses appropriate medical terminology, sentence structures
- interpersonal: interacts with patients and others in an appropriate manner
- follows routine oral and written sequenced instructions
- communication skills: listens to short, explicit instructions to learn new procedures; explains routine procedures to others, eg. workplace safety procedures; participates in workplace meetings by listening for specific information and contributes as appropriate



Key Competencies						
Utilisation of the Key Competencies required in the performance of this unit						
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## Performance levels:

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- establishes criteria for evaluation of processes