Administration Training Package BSA97

Administration Competency Standards

Level 3

(Enhanced)

CONTENTS

BSAINF301B   Maintain information records system to ensure its integrity

This Unit covers creating new files, removing files that are no longer active and maintaining the enterprise's filing system.

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

Element of Competency	Performance Criteria
Assemble new files	• Information to be incorporated in new file is collected and collated • New files are established in an accurate and up-to-date manner • New file is placed on *file recording system* • New files are indexed • Files are sorted by appropriate codes
Identify and process inactive and dead files	• Inactive and dead files are identified and removed and/or relocated
Record documentation movements	• Movement of all documentation is recorded • Overdue records and documentation are identified and a system for their return implemented

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Range of Variables

Information to be incorporated into a new file may include:
- correspondence (eg. faxes, memos, letters, email)
- computer databases (eg. library catalogue, customer records)
- computer files (eg. letters, memos and other documents)
- sales records (eg. monthly forecasts, targets achieved)
- forms (eg, insurance forms, membership forms)
- invoices (from suppliers, to debtors)
- personnel records, leave forms
- minutes of meetings
- product information (eg. price lists, catalogues)
- promotional material (eg. newsletters, brochures, advertised special offers)
- reports

New files may relate to:
- new client
- new project
- new time period (eg. new financial year)
- reorganising material from an existing file
- responding to a new file request form from an internal client

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Collecting and collating information to be incorporated into a new file may include:
- ensuring all of the appropriate information is incorporated
- checking the document is not damaged
- checking that documents to be filed together are secure (paper-clipped, stapled)
- any relevant notes or instructions attached to the document are secure, or written on to the document (circulation list)
- ensuring documents are filed in their original condition

Establishing new files may include:
- creating or assigning a name or number to the file
- creating a client folder in accordance with *enterprise procedures*
- creating an index card for the new file
- documenting the new file in a file register or data base

Establishing new files in an accurate and up-to-date manner may include:
- recording new files on the file index
- filing regularly to avoid documents piling up
- checking client names, titles and addresses
- checking personnel names, titles and addresses
- checking telephone/fax/mobile phone/pager numbers, email and website addresses
- checking the dates documents are received and filed
- checking cash amounts/figures

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Range of Variables

A *file recording system* **may be:**
- a paper-based file register
- a computerised file database
- a card index system

Types of information in a file recording system may include:
- a file name and/or file number
- keywords to help locate the file
- description of material contained within the file
- date on which the file was created
- name of person who requested and/or created the file

Types of indices may include:
- a card index
- a paper index
- an image-based index (micro-fiche)
- an electronic index/database

Indexing new files may include:
- determining logical sequence of the document/file
- indexing by subject
- indexing by alphabetical order
- indexing by numerical order

Appropriate codes for files may include:
- a file number
- a logical keyword
- a relevant subject area
- a colour

Inactive files may include:
- files which contain information that is no longer used but may be needed in the future (eg. past client information, workplace safety incident report)

Dead files may be:
- closed files which are no longer used but must be kept for legal or reporting purposes (eg. tax, records, accounting records)
- closed files which are to be archived for historical or research purposes.(eg. photographs, back issues of enterprise publications

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Range of Variables

Removing inactive or dead files may include:
- transferring records from the active filing system to secondary storage on a case-by-case basis, as files are closed
- transferring files at regular intervals or routinely checking for dead or inactive files (eg. end of financial year, six monthly)
- implementing the double file method
- programming the computer to periodically archive or delete files
- compressing computer files prior to archiving
- using a combination of the above methods

Relocating inactive or dead files may include:
- transferring inactive or dead files to a secure secondary storage location within the enterprise
- clearly labeling and indexing records when relocating
- ensuring confidential and/or sensitive inactive/dead files are kept separate with restricted access
- storing duplicate copies of records off-site

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

Recording movement of all documentation may include:
- using file movement register
- using outcards
- using an electronic database
- using passing slips
- recording all misplaced or lost files

Overdue records and documentation may relate to:
- files which have not been returned by the designated date
- files which have been lost

Implementing a system for the retrieval of overdue records and documents may include:
- creating and using a 'tickler' or follow-up file reminder system
- using a paper-based or electronic calendar to implement a reminder system
- checking the file movement register, outcard or computer database to determine who borrowed the file
- contacting the person who borrowed the file

Range of Variables

Monitoring and tracking lost or misplaced files may involve:
- checking current location of files (eg. mistakenly filed inside another file)
- checking file in tray
- checking for mistakes in initial categorising, indexing or filing of file
- checking that the label, tag or other file identification marker is securely fastened
- checking file removal documentation is completed (eg. file register, outcard, computer database)
- checking inactive or archival records

Evidence Guide

Critical aspects:
- enterprise policies and procedures *are understood and followed*
- information to be incorporated in new file is relevant and appropriate
- information to be incorporated in new file is collected and collated within designated timelines
- new file is created according to *enterprise policies and procedures*
- new file is accurately documented in file register or database
- new file is classified according to *enterprise policies and procedures*
- files are sorted correctly by appropriate codes
- new file is incorporated into the filing system in a logical and correct manner
- inactive and/or dead files are correctly identified
- inactive and/or dead files are removed from the working filing system and filed in secondary storage if appropriate according to *enterprise policies and procedures*
- all records are stored in an environment free from extreme temperatures, dust, sunlight and water
- archived, compressed electronic and other files are retrieved from secondary storage as necessary
- file movement is recorded according to enterprise *policies and procedures*
- the procedure for accessing restricted files is understood and adhered to and the movement of these files is accurately recorded
- overdue files are followed up according to enterprise *policies and procedures*
- lost files are reported to appropriate person and follow up procedure is undertaken
- problems are identified and solutions are implemented with assistance 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:
- filing systems
- workplace manuals and reference materials such as enterprise policy, procedural manuals, staff directories and organisational charts
- computer equipment and relevant software

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

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
- file recording system
- indexing system
- procedures for classifying and sorting files
- difference between inactive and dead files
- understanding the nature of restricted files
- application of *enterprise policies and procedures* required across the full range of tasks covered

Skills
- literacy: follows and interprets *enterprise policies and procedures*; sorts and classifies information by alphabet, numbers, date, or other established principles; identifies obsolete files
- writes clear sequenced written instructions, eg. how to use filing system, record document movement
- research: identifies correct procedures for creation of new files
- numeracy: indexes, codes and sorts files numerically; cross-references information and files where appropriate
- technology: uses appropriate technological materials in order to establish and maintain filing system
- 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; negotiates and consults with colleagues regarding information
- problem solving: identifies problems and implements solutions according to enterprise procedures and prior knowledge; checks precedence for collating and filing information

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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

BSACOM301B Collect and provide information to facilitate communication flow

This Unit covers responding to requests for information, both oral and written and collecting information for drafting everyday correspondence, such as memoranda and messages.

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

Element of Competency	Performance Criteria

Respond to telephone, oral and written requests for information	• Requests are received and recorded
	
	• The request for information is understood
	
	• Information is located from internal/external sources and records:
	  – *by speaking to others*
	  – *from written sources*
	  – *by observation*

Draft routine correspondence in response to a need or a request	• Need for correspondence is understood • Information to be included in correspondence is obtained • Information is drafted into appropriate format for presentation using clear and concise language • Ensure that intended meaning of correspondence is readily understood by recipient • Spelling, punctuation and grammar are correct • Draft is presented to the *nominated officer* for approval on completion of task • Correct signature is obtained, if necessary • Correspondence is filed for use as standard reply to future requests for similar information

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Range of Variables

Enterprise procedures and policies **may include:**
- telephone protocol
- correspondence format
- templates
- client requests

Receipt of requests may include:
- face-to-face
- by telephone
- in written form (eg letter, fax, e-mail)
- internal clients
- external clients

Understanding the request may include:
- clarifying details
- asking further questions
- repeating the request

Locating information may include:
- locating information from internal sources (eg. filing system, computer database/spreadsheet, work colleague/supervisor, library, reception area)
- external sources (eg. another organisation, government department)
- referring the request to an appropriate person within the organisation
- researching the request and passing the information on once it is available

Routine correspondence may include:
- memoranda
- messages
- instructions
- letters
- fax cover sheets
- email messages

The need for correspondence may include:
- information that cannot be relayed verbally
- information that is not readily accessible
- information that cannot be dealt with immediately

Range of Variables

Obtaining the necessary information may include:
- preparing a list of required information
- liaison with colleagues
- consulting a database or filing system
- relevance and accuracy of information

An appropriate format for presentation may include:
- formal letter
- fax
- memo
- covering letter or note to accompany an e-mail attachment/package of material/oral presentation

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Ensuring the intended meaning of correspondence is readily understood may include:
- using simple language
- writing clearly and concisely
- seeking feedback

Correct spelling, punctuation and grammar may include:
- self-checking
- checking by supervisor or colleague
- consulting a dictionary/thesaurus

The *nominated officer* may include:
- supervisor
- the person who requested the information

Filing correspondence may include:
- photocopying
- filing copies correctly
- saving copies on computer hard drive/disk

Evidence Guide

Critical aspects:
- *enterprise policies and procedures* are understood and followed
- requests are received and details of request are clarified accurately and confirmed if necessary
- requests are recorded accurately
- correct location of information is identified
- requests outside own area of responsibility are referred to *appropriate person*
- the roles and responsibilities of enterprise's personnel are understood and requests are directed appropriately
- when information is not readily available, client is contacted and told when information will be available
- requests for information are responded to according to their urgency
- urgent requests are responded to *promptly*
- courier is organised to despatch urgent information if necessary
- timeline for locating and retrieving requests is identified and adhered to
- requests for information are recorded according to *enterprise policies and procedures*
- the need for correspondence is understood
- information to be included in correspondence is collected
- appropriate language, format, greeting and title for recipient is included in written correspondence
- correspondence is clear, concise and correct
- document is checked to ensure intended meaning is conveyed
- correspondence is self-checked for spelling, grammatical punctuation errors, correct content and enclosures
- information meets the requirements of the client
- information is up-to-date
- abbreviations are understood
- language, tone and type of message varies according to the purpose of the message and the audience
- letter is presented to *appropriate person* for progress checks and final approval if necessary
- the correct signature is obtained if necessary
- correspondence is photocopied and filed in correct location and sequence 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 enterprise policy, procedural manuals, staff directories and organisational charts
- computer equipment and relevant software

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

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

Evidence Guide

Underpinning knowledge and skills

Knowledge
- application of *enterprise policies and procedures* required across the full range of tasks covered
- the roles and locations of the enterprise's personnel
- purposes of different types of correspondence
- filing systems
- different types and locations of information

Skills
- literacy: drafts simple correspondence following *enterprise policies and procedures*; varies written communication to meet the requirements of the work context, the intended audience and the purpose of the communication; sequences writing with attention to organising principles of time, importance or other workplace relevant system; spells with accuracy; uses grammar and punctuation effectively as an aid to understanding; takes notes and summarises information
- research: reads written texts to elicit and source information
- proofreading: clarifies intended meaning by proofreading and editing own writing
- communication: participates in informal and formal conversation; questions to clarify and elicit information; speaks with clear pronunciation, stress patterns and intonation
- numeracy: checks data and financial figures; sorts and records oral and written requests
- keyboarding and computer: selects appropriate software application; checks spelling of words using spellchecker; selects appropriate document layout

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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	Level 2	Level 3
• carries out established processes • makes judgements of quality using given criteria	• manages processes • selects the criteria for the evaluation process	• establishes principles and processes • evaluates and reshapes processes • establishes criteria for evaluation of processes

BSAENT301B Provide information and advice regarding the products/services of the enterprise to meet client needs

This Unit covers assessing clients' needs and determining which of the enterprise's products/services the client requires and providing this information or advice to the client.

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

Element of Competency	Performance Criteria
Clarify specific needs of client	• Client needs are accurately assessed against the products/services provided by the enterprise • Features and benefits of the products/services provided by the enterprise are clearly described and recommended for the client's needs • Client details are recorded clearly and accurately in the required format
Provide information and advice	• Client's needs are clarified and appropriate information is provided • Alternative sources of information/advice are discussed with client • Follow-up alternatives are offered
Follow up client needs	• Further information is despatched to client if required • Gaps in available information are identified and are referred to relevant person for action

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Range of Variables

Enterprise policies and procedures **may include:**
- availability of information
- who is responsible for products/services
- pricing and discount policies
- replacement and refund policies and procedures
- payment and delivery options

Products/services of the enterprise may relate to:
- products/services offered to specific clients
- special offers
- competitors ranges
- availability

Modes of enquiry
- telephone
- letter
- email
- in person

Clients may include:
- internal (eg. colleagues, departments, teams)
- external

Client needs may relate to:
- advice or general information
- specific information
- further information
- making an appointment
- complaints
- purchasing or returning the enterprise's products/services

Assessing and clarifying client needs may involve:
- listening actively to what the client is saying/requesting
- re-wording the request to ensure complete understanding
- providing an opportunity for the client to confirm or rephrase the request
- seeking feedback from the client to confirm understanding of needs
- questioning to clarify and confirm the client's needs.

Range of Variables

Features and benefits may relate to:
- help-desk service
- demonstrations
- professional development
- special offers
- price
- comparisons with competitors products/services
- availability
- extra (value added) services
- clients needs
- options

Recording client details clearly and accurately may relate to:
- listening actively to the client
- repeating the client's details to ensure details are correct (eg. telephone number, name, address)
- asking the client to repeat information to ensure accuracy if necessary
- keeping notes while speaking to clients.

The required format may include:
- *enterprise policies and procedures* for keeping records of client contacts
- a computer-based recording system (eg. customer database, telephone log)
- a paper-based recording system (eg. telephone log, customer enquiry/complaint/request for information form)
- ticking boxes on a form
- recording detailed information about a client's request and the action taken
- using a code to record contact information
- recording every contact with a client
- recording client details only if further action is to be taken (eg. if an order has been placed, complaint to be resolved, further information is required)

Providing appropriate information may include:
- clarifying and assessing client needs
- re-directing the client to a more appropriate person within the enterprise
- providing detailed knowledge of products and services offered by the enterprise
- responding to a straightforward request such as the cost of a service by supplying a price list, brochure, catalogue or accessing a database for information
- researching additional information
- suggesting alternatives to the client.

Range of Variables

Discussing alternative sources of information/advice may include:
- understanding client needs
- offering the correct information
- offering advice from a range of sources
- providing a range of options for the client to choose from
- providing information about alternative products/services

Follow-up alternatives may include:
- referring a client to another person in the enterprise
- obtaining information from another person in the enterprise then informing the client
- inquiring if an appointment needs to be made
- arranging an appointment following enterprise *policies and procedures* if necessary
- identifying further action
- checking to see if material provided has been received
- organising for an enterprise representative to visit a client

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Gaps in available information may include:
- the information requested is outside the person's particular area of responsibility or expertise
- the information is not available immediately
- information is being revised/updated
- information is temporarily unavailable

Relevant person may include:
- supervisor
- appropriate person from within the department
- appropriate person from within the enterprise

Evidence Guide

Critical Aspects:
- *enterprise policies and procedures* are understood and followed
- roles and responsibilities of personnel/departments are identified
- key functions, products and services are identified and can be communicated to others
- client requests are matched against the available information about products and services
- features and benefits of enterprise products and services are identified and clearly communicated to clients
- client details are recorded according to *enterprise policies and procedures*
- client request is clarified if necessary and appropriate information is provided
- the nature of non-disclosable information is understood and non-disclosable information is withheld
- knowledge of products and services is used to provide detailed information or alternative suggestions to client
- information is supplied within *designated timelines*
- various options are described and communicated
- options are recommended to match clients needs
- information provided to clients is correct and up-to-date
- judgement is used when dealing with clients
- when information is not immediately available, further information is sought and despatched to client within *designated timelines*
- when request is outside own area of responsibility request is referred to *appropriate person*
- any difficulties are reported to *designated person* as appropriate

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Resource implications:
The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:
- workplace manuals and reference materials such as enterprise policy and procedural manuals
- enterprise promotional material
- customer service charters
- customer service questionnaires

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

Evidence Guide

Underpinning knowledge and skills

knowledge
- enterprise customer service *policies and procedures*
- key functions, products and services of enterprise
- roles and responsibilities of enterprise personnel/departments
- sources of information about enterprise products and services
- options available to offer clients

skills
- literacy: reads and understands informative and promotional material; takes detailed notes of clients' needs; summarises requests for information
- research: locates and extracts specific information to meet a client's request; synthesises relevant information
- demonstrates awareness of the need to vary spoken and written language to meet requirements of audience and purpose
- uses interactional strategies such as providing verbal and non verbal feedback in order to show interest or attitude and presents alternatives to client
- communication: elicits and gives factual information for the purposes of promoting the enterprise; questions to clarify information; participates in interpersonal exchanges, clarifies meaning and maintains interaction for the purpose of establishing, maintaining and developing relationships;
- problem solving: adapts prior experience and examples in the selection of appropriate and efficient methods of solution; identifies gaps in information and suggests alternative ways of sourcing and completing information
- numeracy: records details with numerical data; sorts and records requests for information; estimates costs and methods involved in follow up action
- interpersonal skills
- conflict resolution 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

BSAENT302B Process client complaints to ensure the goals of the enterprise are met

This Unit covers dealing with client complaints according to the enterprise's procedures and ensuring that the client is satisfied

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

Element of Competency	Performance Criteria
Clarify the nature of the complaint	• Details of the complaint are established • Summary of the complaint is recorded accurately • Any inconvenience to the client is acknowledged and an apology is made if appropriate
Identify options for complaint resolution	• Appropriate options for resolving the complaint are identified • Complaint referred to *designated officer* if resolution is not possible
Act to resolve complaint	• Optimal solution is negotiated with the client • Chosen solution is implemented within agreed *time frame* • *Necessary documentation* is finalised • Effectiveness of solution and related outcomes is evaluated • Any necessary changes to *enterprise procedures* are identified and passed on to *relevant person* for action

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Range of Variables

Types of complaints may include:
- general errors (eg. goods invoiced but not delivered; damaged goods)
- administrative errors (eg. incorrect client, product, quantity, price or invoice terms)
- warehouse/storeroom errors (eg. incorrect product or quantity delivered)
- service errors (eg. repairs, service or spare parts)
- delivery errors (eg. lost or delayed during delivery)
- client dissatisfaction with service quality

Establishing details of a complaint may involve:
- listening carefully
- questioning
- encouraging clear and open communication
- checking clear understanding of the complaint
- using simple language
- polite and friendly communication
- prompt and efficient service
- checking client's satisfaction with enterprise's interpretation of complaint

Accurately recording a summary of the complaint may include:
- clarifying complaint details
- completing 'complaints record' form
- paper based recording system
- electronic recording system

Options for resolving a complaint may include:
- updating enterprise records system
- sending the correct goods immediately
- refunding the client
- crediting the client
- accepting the return of goods from the client
- follow up action to restore enterprise's reputation

Identifying appropriate options may include:
- *enterprise policies and procedures* for handling customer complaints
- advice from supervisor or another person experienced in handling client complaints
- discussing available options with the client to arrive at a mutually agreed solution
- referring complaint to higher authority

Designated officer **may include:**
- client customer service manager
- appropriate person within the department or enterprise
- supervisor

Range of Variables

Negotiating a solution may include:
- determining solution with client
- offering prompt solution to complaint
- seeking prompt advice if the client is not happy
- clear communication with the client
- active listening
- checking that the client is happy with the solution
- reassuring the client
- demonstrating commitment to ensure complaint will not reoccur
- apologising for inconvenience
- asking the client if there is anything else that can be done for them
- thanking the client for bringing the problem to the enterprise's attention

Agreed *time frame* may include:
- taking immediate action
- taking action within specified time agreed between client and enterprise
- acting as soon as the product/service or suitable alternative becomes available

The *necessary documentation* may include:
- client complaint record forms
- referring recommended solution to appropriate personnel
- recording follow up action taken
- written authorisation from supervisor or appropriate person
- formally informing relevant authorities within the enterprise

Evaluating the effectiveness of the solution may include:
- ensuring recommended solution is carried out within agreed timelines
- keeping the client informed
- ensuring client satisfaction with the solution process and outcome
- gathering client feedback (eg. questionnaire, telephone)

Necessary changes to *enterprise procedures* may include:
- delivery of goods
- returns policy
- system for recording complaints
- extending/curtailing timelines
- packaging procedures
- update of customer service charter

Evidence Guide

Critical aspects:
- enterprise's complaints *policies and procedures* are identified, understood and followed
- listens carefully to client and establishes details of the complaint through open-ended questioning
- client complaint is recorded accurately according to *enterprise policies and procedures*
- extra information is sought from complainant if necessary
- communication and language used with client is appropriate
- appropriate options for resolving the complaint within enterprise limits are identified
- limits to own level of responsibility and decision making are understood
- if complaint is outside own area of responsibility complaint is referred to designated officer
- all efforts are made to resolve the complaint in conjunction with the client
- the solution to the complaint is implemented within enterprise timelines
- the client is kept informed of complaint resolution process
- necessary documentation is completed according to *enterprise policies and procedures*
- effectiveness of the solution is evaluated and any necessary changes to enterprise procedures are identified and passed on to appropriate 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 company policy and procedural manuals
- customer service charters, questionnaires, complaint reporting forms

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:

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Evidence gathering methods may include:

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- portfolio of work documents
- third party reports

Evidence Guide

Underpinning knowledge and skills

knowledge
- enterprise's products and services
- appropriate higher authorities
- enterprise complaints *policies and procedures*
- impact of own behaviour on outcome of situation
- range of acceptable solutions available
- limit to own scope of responsibility and decision making

skills
- literacy: reads and interprets goals and objectives of enterprise; takes detailed notes of client's problems and needs; summarises problem and writes a brief report; demonstrates awareness of the need to vary spoken and written language to meet requirements of audience and purpose
- research: reads a range of written texts; locates and extracts specific information relating to client's complaint
- communication: questions to clarify information regarding client's complaint; gives oral instructions; uses interactional strategies to elicit and provide constructive feedback; refers complaint to peers or supervisors
- problem solving: recognises and identifies problems; negotiates an appropriate and efficient solution using prior experience, other examples and input from peers, supervisor and client
- numeracy: records details with numerical data; sorts and records complaints; estimates time to resolve problem; adheres to *designated timelines*
- interpersonal: willingness to help
- presentation skills
- conflict resolution 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
2	2	2	2	1	2	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 *workplace rights and responsibilities of employees and employers*	• *Rights and responsibilities of employees and employers* are identified and outlined clearly • Self and other's *behaviours* which contribute to a cooperative team and a safe work environment are identified and practised • *Workplace procedures* for upholding employee and employer rights and responsibilities are followed wherever necessary within the scope of responsibilities and competencies
Identify areas in which discrimination can occur in the workplace	• Information relating to anti-discrimination is collected, key points are identified and understood • *Avenues for reporting and responding to discrimination* are identified and *procedures* are outlined clearly • *Avenues for resolving disputes* within the workplace are identified and procedures for implementing dispute resolutions are outlined clearly
Prepare documentation covering workplace terms and conditions	• Documents outlining workplace *working conditions* are located, summarised and any uncertainties are clarified with appropriate personnel • *Different terms* under which persons can be employed are identified and understood • Information from relevant employer and employee support organisations is obtained and key points are identified and understood

Element of Competency	Performance Criteria
Prepare for change and career advancement in the workplace	• *Any changes to workplace work environment are identified and training is sought where necessary* • Career information centre *is contacted and advice/assistance is obtained where necessary to develop a career plan* • *Current skills are identified and skills are matched to relevant careers* • *Additional skills required to achieve career advancement are identified* • *Options for attaining additional skills are identified and pursued where appropriate* • *Up-to-date resume is prepared and produced*

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

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Range of Variables

Different terms under which a person can be employed may include:
- Awards
- Certified Agreements
- Australian Workplace Agreements
- contracts

Support organisations may include:
- Trade Unions
- Employer Associations
- Professional Associations
- The Employment Advocate

Changes to workplace environment may include:
- change to software and hardware
- changes to workplace equipment, machinery
- changes to office fit out

Career information may be obtained from:
- libraries and local community centres
- Centrelink
- TAFEs, Universities and Secondary Colleges
- Registered Training Organisations
- Internet
- network of friends
- newspapers

Avenues for attaining additional skills may include:
- on-the-job training
- taking on additional responsibilities in the workplace
- completing short/TAFE/university courses
- volunteer work

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

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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

BSATEC301B Use the advanced functions of a range of office equipment to complete daily tasks

This Unit covers coordinating the advanced functions of a range of office equipment (for example, a computer and an audio transcriber or a computer and a financial calculator) to complete daily tasks.

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

Element of Competency	Performance Criteria
Operate equipment	• The range of the equipment's functions is known • A range of advanced functions of office equipment is used • Advanced functions are operated correctly
Complete tasks	• Task is completed coordinating the advanced functions of a range of office equipment within *designated timelines*
Ensure equipment is maintained	• Maintenance program for equipment is scheduled to ensure minimum downtime is experienced • Signs of problems are identified and/or anticipated, and options for solutions are clarified with *colleagues and/or supervisor*

Range of Variables

Equipment used may include:
- computer
- audio transcribing machine
- financial calculator
- overhead projector
- photocopier
- facsimile
- scanner
- telephone system
- shredder
- laminator
- binder
- franking machine

Advanced functions may include:
- performing calculations in tables and spreadsheets
- performing a mail merge
- image overlapping/separation on a photocopier
- sending email with attachments
- setting up conference calls
- using group dialing on a facsimile
- creating links between documents and software applications

Operating functions correctly may include:
- within the capabilities of the equipment
- within occupational health and safety requirements
- referring to instruction or training manuals
- in the correct order

Coordinating advanced functions may include:
- using resources efficiently
- planning
- organising a work schedule
- streamlining parts of the task
- consulting manuals and instructions
- following workplace policies and procedures

Within designated timelines may include:
- deadline agreed with supervisor
- deadline agreed with internal/external client
- in coordination with colleagues

Range of Variables

Maintenance program for equipment may include:
- checking stock levels
- replacing components (eg. paper, toner, staple cartridge)
- clearing paper jams
- cleaning equipment
- programming/setting up equipment (eg. fax numbers for group dialing)
- arranging for technician to clean, check and repair equipment

Minimum downtime may include:
- prompt problem resolution
- time taken to service equipment

Identifying and/or anticipating problems may include:
- routine checking of equipment
- preparation of a maintenance program
- encouraging feedback from work colleagues
- keeping a log book of detected faults
- checking that repairs have been carried out

Options for solutions may include:
- fixing the fault
- informing supervisor
- proposing possible solutions to supervisor
- contacting appropriate service person

Evidence Guide

Critical aspects:
- the range of functions of office equipment are identified and understood
- advanced functions of a range of office equipment are carried out efficiently according to the manufacturer's instructions
- tasks are completed using advanced functions of a range of office equipment
- tasks are completed within *designated timelines*
- resources are used efficiently
- *enterprise policies and procedures* for maintaining office equipment are understood and common maintenance tasks are undertaken according to manufacturer's instructions
- maintenance program is prepared and followed so that the likelihood of breakdown is minimised
- equipment faults or anticipated faults are acted upon or reported to *appropriate person* according to *enterprise policies and procedures*
- any difficulties are reported to *designated person* as appropriate

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 office equipment user manuals, enterprise policy and procedural manuals

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

Evidence Guide

Context of assessment:

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

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

Evidence gathering methods may include:

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

Underpinning knowledge and skills

Knowledge

- range of advanced functions of office equipment
- *enterprise policies and procedures*
- identification of equipment faults
- routine maintenance of office equipment
- servicing options and procedures
- needs of internal/external clients

Skills

- literacy: follows technical manuals; performs a sequence of routine tasks given specific directions; interprets information from an appliance manual
- problem solving: chooses appropriate software; identifies technical problem and chooses efficient solution; identifies best course of action if the timelines are not being met
- 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
- numeracy: interprets graphs and diagrams in a technical manual: estimates time to complete each task and uses a calendar/diary to manage workloads and prioritise tasks
- organisational and team: consults with group members on operating procedures

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<table>
<tr><td colspan="7" align="center">**Key Competencies**</td></tr>
<tr><td colspan="7">Utilisation of the Key Competencies required in the performance of this unit</td></tr>
<tr>
<td>Communicating ideas and information</td>
<td>Collecting, analysing and organising information</td>
<td>Planning and organising activities</td>
<td>Working with others in a team</td>
<td>Using mathematical ideas and techniques</td>
<td>Solving problems</td>
<td>Using technology</td>
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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

BSATEC302B Design and develop documents, reports and worksheets

This Unit covers identifying ways in which existing document production processes can be made more efficient while maintaining high standards in appearance and presentation. 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
Identify document requirements	• Enterprise requirements for information entry, storage, output and quality of presentation are identified from the *nominated person* • Enhancements to document production processes are identified
Design and enhance document formats	• Document design is appropriate for the efficient entry of information • Document design maximises the appearance and presentation of the document • The range of functions incorporated into the document design reflects the nominated requirements of the enterprise

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Range of Variables

Enterprise requirements may include:
- guidelines for document design and production
- document style manual
- templates
- information entry speed requirements
- colour printing
- binding
- logical organisation of information
- easy access to and retrieval of information
- information presented appropriately
- house style (margins, fonts)

Nominated person **may include:**
- direct supervisor
- office manager
- publications manager
- marketing manager

Document production processes may include:
- choosing appropriate software application
- structure of document
- printing options (eg. colour, colour copying, outsourcing)
- binding
- format of document
- following enterprise procedures and policies
- following specific production directions

Types of documents may include:
- letter, memo and fax
- briefing paper
- database
- financial report
- table
- questionnaire
- flyer
- spreadsheet
- chart

Range of Variables

Maximising the appearance and presentation of the document may include:
- inserting symbols
- using coloured text
- adding borders or shading
- enhancing text
- incorporating graphics and pictures
- using tables and charts
- adding headers and footers

The range of functions incorporated into document design may include:
- formatting
- text layout
- importing graphics, charts, tables
- using formulae
- linking documents

Evidence Guide

Critical aspects:
- purpose of document and audience requirements are clarified and understood
- *enterprise policies and procedures* regarding the entry, storage, output and quality of presentation are identified with the nominated person
- the appropriate software applications are selected
- document production process meets document and enterprise requirements
- a range of formatting features which enhance the presentation and readability of the document are identified and used
- the document design allows information to be entered efficiently
- the range of functions incorporated into the document appropriately reflect the *nominated requirements of the enterprise*

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

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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

Recording assessment
If this unit is successfully assessed the recording of this assessment will include "Design and develop documents, reports and worksheets (PRODUCTS & VERSIONS)"

Evidence Guide

Underpinning knowledge and skills

Knowledge
- range of functions of computer software
- the impact of formatting on presentation and readability
- enterprise document production and design process

Skills
- literacy: follows and understands the firm's procedures; uses basic models to produce a range of correspondence; uses page layout to support text structure; completes a range of formatted texts
- proofreading and editing: checks own work and rereads for accuracy against original
- communication: participates in informal conversations regarding computer technicalities; questions to clarify information; consults peers and supervisors where necessary to seek enhancement to document design
- numeracy: enters data and calculations
- keyboarding and technology: completes a range of formatting skills
- problem solving: determines document design/production/ enhancements

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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

BSATEC303B Maintain computer files

This Unit covers moving computer files between directories and folders and carrying out backup procedures.

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

Element of Competency	Performance Criteria
Carry out file maintenance	• Files are copied, deleted and renamed as required • Directories or folders are created as required • File registers are maintained according to *enterprise guidelines* • Security checks and procedures are inserted where necessary • Backups are carried out as required • Backup files are stored in the *designated manner* and *location* • Record of backups is maintained • Virus protection measures are used according to *enterprise guidelines*

Range of Variables

Copying, deleting and renaming files may include:
- copying/deleting to and from a range of locations:
  - hard disc
  - network server
  - floppy disc
  - internet
  - CD ROM
- renaming:
  - folders
  - files

Creating directories or folders may include:
- logical and orderly structure of folders
- efficient naming of directories or folders
- insertion of file name and location in document
- storing related files together in common folder

Enterprise guidelines **may include:**
- backup procedures
- file maintenance
- file storage
- deleting/renaming procedures
- updating file index, cross referencing

Security checks and procedures may include:
- storage of data/files
- access controls, eg. passwords, read-only files
- installing surge protectors
- write-protecting floppy disks

Carrying out backups may include:
- identifying files for backup
- frequency at which backup occurs
- responsibility for regular backup
- particular computers

Range of Variables

Storage of backup files may include:
- external hard disk
- floppy disk
- tape
- CD ROM
- on site/off site
- in fireproof rooms
- at locations away from the office site
- in rooms secured against unauthorised entry

Backup record may include:
- system to verify backup completed as scheduled
- exception report

Virus protection measures may include:
- anti-virus software
- controlling disk usage
- file sharing restrictions
- email attachment restrictions

Evidence Guide

Critical aspects:
- file is copied either between folders or drives using both keyboard and mouse functions
- files are deleted according to *enterprise policies and procedures* as necessary
- files are renamed logically according to *enterprise policies and procedures*
- file management application is used to create directories and folders as necessary
- the integrity of the computer filing system is maintained
- the filing system operates smoothly
- security procedures and checks are identified and followed
- backup procedures are identified and back-up files are created according to *enterprise policies and procedures*
- backup media is labeled and stored according to *enterprise policies* and procedures
- backups are recorded according to *enterprise policies and procedures*
- virus protection measures are understood and used according to *enterprise policies and procedures*
- any uncertainties are referred to an appropriate authority promptly

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 user manuals, company policy and procedural manuals

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

Evidence Guide

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

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

Underpinning knowledge and skills

Knowledge
- enterprise computer filing system
- appropriate storage media
- functions of file management applications
- virus protection measures
- enterprise backup *policies and procedures*
- OHS

Skills
- literacy: follows an enterprise's filing system; identifies obsolete files; interprets training notes, user manuals, keeping records; sequences writing with attention to file code according to organisation's requirements
- numeracy: indexes and sorts files; sorts and classifies information;
- communication: listens to clear sequenced instructions of several steps to complete task; questions to clarify status or physical location of file

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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

BSATEC304B Operate and maintain computer printer

This Unit covers setting a printer to suit documents requirements, and carrying out routine and preventative maintenance.

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

Element of Competency	Performance Criteria
Set printer for document requirements	• Printer is initialised according to specifications • Complexity, layout and style of documents are consistent with printer capacity • Printer is set up to accept the software and functions being used
Maintain printer	• Cleaning and minor maintenance functions are performed in accordance with manufacturer's instructions • Printer faults are reported to the *nominated person* for rectification

---

Range of Variables

Initialising to specifications may include:
- using user manuals
- using on-line help
- using enterprise procedures manuals
- following instructions
- installing printer (stand alone or as part of network)
- connecting printer to relevant computer
- installing print head (if appropriate)
- installing ink cartridge or toner
- installing printer software onto computer system
- ensuring printer is ready to print

Complexity, layout and style of documents may include:
- labels
- colour printing
- tables, charts and borders
- envelopes
- letterhead
- scanned images
- paper type and size

Setting up printer for different functions/software may relate to:
- continuous feed printer
- printer shared on a network
- stand-alone printer
- background printing
- changing paper size and orientation
- using different paper for sections of a document

Cleaning and minor maintenance functions may include:
- keeping printer in correct environment
- regular wiping with cloth
- changing toner/ink cartridge
- clearing paper jams
- replacing replaceable parts

***Nominated person* may include:**
- supervisor
- office manager
- manufacturer's service centre
- authorised technician

Evidence Guide

Critical aspects:
- a range of printer functions are identified and understood
- printer software is installed according to manufacturer's instructions
- printer used most regularly is set up as the default printer
- printer capacity is considered when designing layout and style of document
- printer is configured so that it accepts software and functions being used
- printer defaults are set according to *enterprise requirements*
- the printer is operated correctly
- different types of paper are used by selecting appropriate trays
- printer functions are identified and used to manage printing tasks
- printer is cleaned regularly according to manufacturer's instructions
- printer faults are identified and rectified according to *enterprise policies and procedures*
- faults outside own area of responsibility are reported to *nominated person*
- routine maintenance is undertaken according to *enterprise policies and procedures*

Resource implications:
The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:
- workplace manuals and reference materials such as enterprise policy, procedural manuals, printer and software manuals, instructions
- printer and relevant software
- different types of paper

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

- installing a printer
- printer capabilities
- printer software
- *enterprise policies and procedures* in relation to all tasks
- authorised technicians

Skills

- literacy: reads and understands a technical manual where the information is supported by diagrams, sufficiently well to be able to locate and comprehend particular information required; follows step-by-step instructions
- communication: listens to clear sequenced instructions of several steps and performs tasks related to using technology; expresses opinion regarding the use of technology, eg. difficulties and advantages of equipment; clarifies with technician the use of a particular technology; listens to and notes specific information during a conversation with a computer technician
- referral: identify to whom to refer any printer problems
- problem solving: follows relevant manuals; ensures that the printer design fits the task

---

Key Competencies						
Utilisation of the Key Competencies required in the performance of this unit						
Communicating ideas and information	Collecting, analysing and organising information	Planning and organising activities	Working with others in a team	Using mathematical ideas and techniques	Solving problems	Using technology
1	1	1	*	*	2	2

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

BSAORG301B Coordinate own work schedule with that of others to achieve agreed team/section goals

This Unit covers negotiating work schedules to coordinate with the work team and to achieve team tasks within timelines.

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

Element of Competency	Performance Criteria
Develop own work schedule to achieve team goals	• Team goals are clarified and agreed upon by the team • Work schedule is negotiated and agreed upon with *nominated officer* and *team* • Timelines for achievement of priorities are determined
Coordinate own work schedule with others	• Others' priorities are established in discussion • Timelines for achievement of priorities are determined • Individual tasks are prioritised in discussion with others • Tasks and priorities are reviewed with a change of instruction from a *nominated officer* • Tasks are completed within *designated timelines*

Range of Variables

Enterprise's *policies and procedures* may relate to:
- team meetings
- reporting arrangements
- project timelines
- goal setting
- business plans

Team/section goals may include:
- identifying enterprise goals
- overall goals
- specific goals
- refining and/or improving existing team goals
- seeking new goals

Clarification may include:
- seeking and incorporating a contribution from each team member
- recognising and understanding each team member's skills and capabilities
- group discussion of the team's objectives and desired outcomes

---

Work schedule may include:
- daily tasks and responsibilities
- extra tasks or skills that may need to be accomplished to achieve team goals

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Negotiation and agreement may include:
- recognition of each team member's capabilities and skills
- trading off certain tasks and/or responsibilities for others
- a formal or informal consultation process

The *nominated officer* may include:
- supervisor
- team leader
- manager

The team may include:
- a group of two or more people within the office
- a group of people from different departments within the organisation
- internal/external clients
- formal/informal structure

Range of Variables

Timelines may relate to:
- deadlines agreed with supervisor
- deadlines agreed with team
- deadlines determined by client
- formal or informal agreements
- group or individual processes
- wall charts, whiteboard planners, electronic calendars and diaries

Others' priorities may include:
- external clients' requirements
- internal clients' requirements
- enterprise goals and objectives
- team member commitments

Discussion may include:
- formal meetings
- informal conversations
- electronic mail, telephone or interoffice memo

Prioritising may involve:
- structuring and sorting work tasks as effectively as possible
- understanding which tasks tend to be deferred over others
- delegating responsibility when appropriate
- scheduling work priorities on a daily and/or weekly basis
- utilising resources (eg. action planning worksheets, monthly/weekly planners, daily time logs)

Resources required to complete tasks may include:
- a diary, whiteboard planner, wall calendar or electronic planning system
- an up-to-date filing system
- time
- people
- money
- equipment
- stationery

Evidence Guide

Critical aspects:
- team's overall and specific goals are clarified and consensual
- team work schedule is developed and individual tasks are allocated
- tasks in individual work schedules reflect and support team goals
- responsibilities involved in being part of a team are understood
- own work schedule is subject to ongoing review and re-organisation in consultation with a supervisor or team members when necessary
- realistic timelines for tasks are regularly set and achieved
- a range of planning tools and methods are understood and demonstrated
- work priorities are understood and competing demands are negotiated when necessary
- the individual is able to consistently monitor the quality of own work performance
- any difficulties in completing tasks and/or achieving *designated timelines* are reported to *designated person* if necessary

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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:
- reference materials, such as team organisational charts and planner
- resources required in order to complete tasks
- planning tools
- business plan
- team/section work schedule
- own position description
- list of tasks
- diary
- wall planning chart
- office procedures manual
- examples of workplans developed in the enterprise

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

- *team* goals and priorities
- the interdependence between individual tasks and *team* goals
- planning resources needed to achieve tasks and goals

Skills

- literacy: reads and understands an enterprise's goals and procedures; extracts and interprets tasks from a list; formulates a list of agenda items to be completed; reads items produced by others and questions to clarify meaning; writes short reports for a specified purpose; writes short formal letters outlining instructions for a particular routine task
- problem-solving: adapts prior experience and examples in the selection of appropriate and efficient methods of solution; draws on personal experience, prior knowledge and mathematical knowledge within context to make predictions
- communication: canvasses a group of people for issues and views; participates in a small group discussion to negotiate tasks and solve problems; listens to and notes individual preferences regarding arrangements for group activity; clarifies defined purposes and objectives to be achieved by working with others; coordinates own work schedule with others in the team
- self-management: prioritises work tasks
- time-management: achieves work tasks within designated timelines
- self-assessment: monitors the quality of own work performance

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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

BSATEM301B Negotiate with team members to allocate and complete tasks to achieve team goals

This Unit covers identifying the team's goals and timelines, negotiating with the team to allocate tasks and ensuring the goals and timelines are met.

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

Element of Competency	Performance Criteria
Clarify tasks to achieve team goals	• The *designated goals* to be achieved are identified • Tasks required to achieve the goals are identified • Strategies and timelines to complete tasks are identified
Negotiate allocation of tasks	• Individual responsibilities are negotiated and allocated • Timelines for completion of tasks are agreed upon • Resources and support necessary to complete tasks are identified and made available
Monitor completion of allocated tasks	• Agreed timelines for completion of tasks are checked at *regular* intervals • Alternative strategies to achieve allocated tasks are negotiated when *designated timelines* are not being met • Support is provided to colleagues to ensure completion of allocated tasks

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Range of Variables

Designated goals may include:
- management
- specific projects
- department goals
- enterprise goals
- administrative support
- sales
- customer service
- project
- financial management

Identifying goals may include:
- clarifying and confirming the goals
- defining goals
- defining new goals
- refining existing goals to ensure their relevancy and modifying them if necessary

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Identifying tasks may include:
- breaking each goal down into separate tasks
- team leader proposing what tasks are needed and informing the team
- team leader preparing a draft list of tasks and discussing them with the team
- team discussing possible tasks as a group until the required tasks are identified

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Strategies may relate to:
- deciding on the best way to work on tasks to ensure the *designated timelines* are met
- making decisions on how the team operates
- training team members
- reporting or support relationships
- communication channels
- authorisation to accessing restricted areas
- group decision making
- brainstorming

Negotiating responsibilities may include:
- listening to other people's needs
- trying to create a situation where the tasks will get completed in time and everyone is satisfied
- offering to work on a particular task
- discussing team skills and preferences
- asking for training or support to complete a particular task

---

Range of Variables

Allocating responsibilities may include:
- the team leader directing people to different tasks
- the team leader negotiating with team members
- the team deciding together how the tasks should be allocated

Agreeing upon timelines may include:
- team discussion
- team leader negotiating with the team
- negotiating with the client
- considering factors external to the enterprise that effect the tasks

Resources may include:
- people
- time
- money
- equipment
- materials

Support may include:
- demonstrating how to do something
- helping to complete a task if someone is too busy
- giving encouragement
- providing feedback
- taking on extra tasks

Checking agreed timelines at *regular* intervals may involve:
- holding regular team meetings to report on progress
- setting mini-deadlines during a project where work is presented to a supervisor
- monitoring daily work schedules
- monitoring long-term work schedules

***Designated timelines* may include**
- personal deadlines
- timelines agreed by the team leader
- timelines agreed in discussion with the team members
- client negotiated timelines

Range of Variables

Alternative strategies may include:
- allocating more people to work on the task
- allocating a different person to work on the task
- providing assistance such as advice, ideas, support, administrative assistance to the person working on the task
- modifying team membership

Evidence Guide

Critical aspects:
- team goals are identified and can be explained
- relationship of team goals to enterprise goals are understood and can be explained
- understands and demonstrates understanding of purpose of team goals
- overall team goals are broken down into specific goals and specific tasks
- contributes to team discussions/meetings
- seeks clarification of team goals if necessary
- assists in setting timelines and establishing workplan
- accounts for external factors in setting timelines
- tasks are allocated according to ensure team goals are achieved and according to team members' strengths
- timelines are agreed upon
- progress of tasks is monitored to ensure that set tasks will be completed within *designated timelines*
- contingency plan is prepared as needed
- team members are coached and supported to achieve team goals
- assistance is offered to other team members as necessary
- achievements of team are acknowledged to team
- responsibility for tasks is negotiated with team members and agreement is gained
- resources required for the achievement of tasks are identified and secured
- availability of resources is considered in planning process
- team operates smoothly to achieve set goals

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 goals
- enterprise *policies and procedures* across the range of tasks required
- team members' strengths

Skills
- literacy: reads and understands the enterprise's goals and procedures; extracts and interprets tasks from a list; follows sequenced written and verbal instructions; takes notes to clarify information relating to goals and tasks
- problem-solving: adapts prior experience and examples in the selection of appropriate and efficient methods of solution; uses some approximation with reference to relevant experience to check that the outcome fits task or activity
- communication: participates in a small group discussion to solve a problem or share opinion with the group, eg. expresses opinion regarding workplace decisions, informs relevant person if resources are inadequate or if timelines are not being met; clarifies defined purposes and objectives to be achieved by working with others; questions to clarify how information may apply to group activities or represent group's interest; provides constructive feedback
- numeracy: designs and adheres to schedules, uses appropriate resources to meet deadlines; accurate recording and estimation skills

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

Performance levels:

Level 1
- carries out established processes
- makes judgements of quality using given criteria

Level 2
- manages processes
- selects the criteria for the evaluation process

Level 3
- establishes principles and processes
- evaluates and reshapes processes
- establishes criteria for evaluation of processes

BSACOM302B Take dictation to produce a text

This Unit covers taking notes (shorthand or longhand) from a dictated source and then producing an accurate text from the notes.

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

Element of Competency	Performance Criteria
Take dictation	• Shorthand notes, longhand notes, or transcriptions from an audio tape that reflect the intended meaning of the dictated source are recorded • Notes are recorded to the *designated degree* of accuracy • Notes are self-checked for accuracy
Transcribe dictated notes	• Legible script that reflects the intended meaning of the original dictation is produced • Text is produced within *designated timelines* • Final text is self-checked for accuracy

---

Range of Variables

Reflecting intended meaning of the dictated source may include:
- accuracy of notes/transcription
- clarity of audio tape
- checking correlation between source and notes
- clarifying intended meaning with original source

Dictation source may include:
- dictaphone
- audiotape
- face to face direction

Designated degree **of accuracy may include:**
- correct usage of technical vocabulary
- specified speed and accuracy
- keeping up with pace of dictation

Self-checking for accuracy may include*:*
- replay tape
- reading over notes or transcriptions
- clarifying queries if necessary
- spelling
- punctuation
- grammar
- syntax
- paragraphing

Legible script may include:
- readable
- understandable
- clear
- correct

Intended meaning of original dictation may include:
- accuracy of text produced from notes taken
- clarity of expression

Designated timelines may include:
- deadline agreed with supervisor/colleague/person requiring text
- enterprise deadline (eg. meeting minutes/agenda)

Evidence Guide

Critical aspects:
- shorthand symbols are correctly identified and understood
- shorthand outlines are written clearly and correctly using the rules applicable to nominated shorthand system
- correct shortforms of the shorthand system are used
- correct punctuation signs of the shorthand system are used
- shorthand is read from shorthand outlines
- longhand is legible
- shorthand and longhand notes reflect intended meaning of the dictated source
- audio tape is transcribed and transcription reflects intended meaning
- the speed and the accuracy of taking dictation are performed to enterprise standards: this may be the standard outlined in Standards Australia shorthand speed AS 2907-1986
- notes are self-checked for accuracy and points are clarified if necessary
- legible script of dictation is produced which conveys intended meaning of original dictation
- final text is self-checked and spelling, punctuation and grammar are correct
- final text is presented to *appropriate person* for approval
- amendments made 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 reference materials including shorthand manuals
- computer equipment including relevant software
- tape recorder including audio tapes
- dictaphone equipment

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

Recording of assessment
If this unit is successfully assessed the recording of this assessment will include "Take dictation to produce a text (TRANSCRIPTION SYSTEM)"

Underpinning knowledge and skills

Knowledge
- shorthand methods
- functions of relevant software applications
- functions of tape recorder and/or dictaphone equipment
- protocols

Skills
- shorthand
- note-taking
- dictaphone
- literacy: drafts simple correspondence following *enterprise policies and procedures*; varies written communication to meet the requirements of the work context, the intended audience and the purpose of the communication; displays ability to predict context; interpret intonation and stress; sequences writing with attention to organising principles of time, importance or other workplace relevant system; spells with accuracy; uses grammar and punctuation effectively as an aid to understanding; ability to synthesise information; use abbreviations and acronyms.
- communication: follows routine verbal instructions comprising defined steps; questions to clarify and elicit information; asks for repetition when listening
- proofreading: proofreading and editing own writing

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	0	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

BSAORG302B Organise schedule on behalf of others to achieve team/section goals

This Unit covers organising someone else's schedule, for example making appointments and organising travel and accommodation, within timelines.

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

Element of Competency	Performance Criteria
Make and record appointments on behalf of another	• Another's priorities are established and clarified in discussion • Timelines for achievement of priorities are determined • Appointments are arranged upon request • Alternative arrangements are negotiated and confirmed when established appointments are changed • *Records* are kept up to date, legible, accurate and accessible
Make travel and accommodation bookings in line with given itinerary	• Purpose of travel and itinerary are clarified • Travel and accommodation requirements are identified • Bookings are made in line with the identified needs • Documentation is checked and discrepancies rectified • Details of arrangements are forwarded to traveller within *designated timelines* • Signs of problem(s) are identified and/or anticipated and solutions implemented

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Range of Variables

Enterprise policies and procedures **relating to travel arrangements may include:**
- availability of information
- consulting a particular person or department within the enterprise
- individuals authorised to approve travel and expenditure
- preferred travel agents
- preferred airlines
- preferred method, class and suppliers of travel
- membership details of the person on whose behalf the arrangements are being made
- documentation to be completed by the traveller(s)
- method of payment
- making appointments (eg. clients who have priority, booking systems, recording systems)
- making travel arrangements (eg. documentation to be completed by traveller, payment options, preferred travel suppliers)

Clarified in discussion may include:
- an informal conversation
- a formal meeting
- a range of communication methods, both written and verbal

Timelines may relate to:
- formal agreements
- existing commitments
- scheduled meetings
- client preferences
- wall charts
- diary entries
- whiteboard planners

Arranged appointments may include:
- telephone calls
- fax messages
- letters
- email messages
- memoranda
- face-to-face conversations

Alternative arrangements may relate to:
- inserting additional appointments after a schedule has been prepared
- canceling pre-arranged appointments
- rescheduling existing appointments

Range of Variables

Confirmation of alternative arrangements may include:
- letters
- telephone calls
- fax messages
- email messages
- memoranda
- face to face

Records may include:
- filing system
- diary
- calendar
- paper based
- electronic

Type of diary/appointments system may include:
- appointment book
- whiteboard/planning chart
- calendar
- desk diary
- electronic calendar/diary

Travel and accommodation requirements may include:
- purpose of travel
- scheduled dates and times of trip
- number of people travelling
- names of people travelling
- method of travel
- preferred travel company
- class of travel
- travel preferences
- preferred departure time
- preferred arrival time
- ticket arrangements
- duration of accommodation
- class of accommodation
- accommodation facilities required
- necessary travel documentation
- necessary business documentation and materials
- financial arrangements

Range of Variables

Specialist texts may include:
- timetables and forms
- bookings
- tickets

Travel bookings may include:
- travel carriers and/or accommodation
- cost (including available discounts)
- confirmation requirements
- check-in and check-out times
- method of payment required

Travel documentation may include:
- written confirmation of travel arrangements
- passport
- visa(s)
- timetables
- maps
- necessary credit arrangements
- a travel form which the enterprise requires the traveller to complete
- necessary business documentation

Discrepancies may include:
- incomplete documentation
- incorrect documentation
- out of date documentation
- double booking of flight or accommodation

Details of travel arrangements may include:
- personal checklist
- formal itinerary
- travel file

Designated timelines **may relate to:**
- travel times
- scheduled meetings
- written and/or verbal arrangements with travel suppliers
- formal or informal agreements on appropriate time frames

Range of Variables
Signs of problem(s) may include: • booking difficulties, delays or re-scheduling • additional appointments • appointments cancelled • conflicting business appointments or priorities • different time zones

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Evidence Guide

Critical aspects:
- enterprise *policies and procedures* in regard to appointments and travel arrangement are clearly understood and followed
- priorities of others are clarified and understood
- appropriate appointment procedure for different types of appointments is followed
- details of appointment are clarified before the appointment is made
- appointments are confirmed, changed and cancelled when necessary
- appointments are clearly recorded in appropriate media
- realistic timelines are established to complete arrangements on behalf of others
- required resources for making satisfactory travel arrangements are collected
- requirements of the person on whose behalf travel arrangements are made are clearly understood and met
- travel bookings are arranged accurately in accordance with other's plans
- travel records are kept accurate and up to date
- confirmation of travel arrangements is made either verbally or in writing
- possible problems are anticipated in order to prepare a range of alternative plans that can solve the problem satisfactorily
- any difficulties are reported to *designated person* 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:
- enterprise manuals and reference materials outlining *policies and procedures* regarding appointments and travel arrangements
- a collection of resources that assist with travel arrangements
- diary and planner resources to record and schedule appointments and travel arrangements
- enterprise *policies and procedures* related to business travel
- appropriate timetables and forms
- reference material, such as possible accommodation and transport suppliers
- calendar
- appointment books, diaries and other recording systems
- preferred suppliers and contact details
- maps

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

Evidence Guide

Context of assessment:

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

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

Evidence gathering methods may include:

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

Underpinning knowledge and skills

Knowledge

- enterprise *policies and procedures* in regard to making appointments and travel arrangements
- the relationship between organising another person's schedule satisfactorily and achieving team goals
- an understanding of the responsibility involved in making other's arrangements
- information sources

Skills

- literacy: reads a range of procedural texts, timetables etc; writes simple instructions for a particular routine task; sequences writing; interprets information gained from tables, charts and time tables
- communication: discusses and confirms requirements and priorities of others; questions to clarify information
- time-management: allows realistic timelines to make travel arrangements and schedule appointments
- problem-solving: negotiates task distribution with other members of the group; selects most efficient and appropriate methods of travel, times for appointments etc.
- numeracy: time estimation and accurate planning and recordkeeping

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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

BSAFIN301B Maintain daily financial records for accounting purposes

This Unit covers maintaining common financial records such as petty cash, cash journals, bank reconciliations and accounts.

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

Element of Competency	Performance Criteria
Enter cash transactions into cash journals	• Transactions are entered into cash journals and totalled • Cash journal entries are checked against individual documents • Cash journals are cross checked and proofed • Cash journal errors are noted and reported to *nominated person/section* for resolution within *designated timelines*
Prepare bank reconciliations	• Cash receipts and payment summaries are checked for accuracy against bank statements • Direct debits and credits are entered into cash journals • Discrepancies are noted and resolved • *Regular* reconciliation reports are produced within *designated timelines*
Enter credit transactions into journals	• Credit transactions are entered into journals • Discrepancies between transaction documentation and account entries are identified • Journals are cross checked and proofed • Errors in documentation are rectified

Maintain creditors and debtors systems	• Transactions are entered into individual debtor and creditor accounts
	• Discrepancies are identified in individual debtor and creditor accounts
	• Errors in documentation are rectified or referred to the *nominated person* for action
	• Schedule of debtors and creditors is prepared and reconciled within *designated timelines*

Range of Variables

Cash journals may include:
- cash payments journal
- cash receipts journal

Transactions may include:
- day-to-day expenses
- purchases paid by cheque
- withdrawal of cash by owner
- payments to creditors
- interest charges and bank fees
- capital contributions in cash by owner
- payments received by debtors
- cash sales
- commission
- interest revenue

Source documents may include:
- cheque butts
- bank statements
- cash register roll
- receipts

Cross checking and proofing may include:
- checking accuracy of data against source documents
- checking totals

Reporting errors to *nominated person/section* for resolution may include:
- informing supervisor
- accounts department

Checking for accuracy with bank statement may include:
- matching credit column of bank statement to cash receipts journal
- matching debit column of bank statement to cash payments journal

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Range of Variables

Entering direct debits and credits into cash payment/receipt journal may include:
- checking source documents (eg. cheque butts, bank statements)
- creditors (accounts payable)
- debtors (accounts receivable)
- purchases
- sundries
- referencing to chart of accounts

Discrepancies may include:
- bank charges
- interest
- dishonoured cheques
- errors in transposing between source documents and journals

Resolution procedures may include:
- adding bank charges to cash payments journal
- adding interest revenue to cash receipts journal
- entering amount of dishonoured cheque in appropriate journal (eg. Deduct in Cash Receipts Journal, General Journal entry)
- checking source documents for accuracy of transposing data
- adjusting the journal as appropriate
- totalling adjusted journals
- prepare Bank Reconciliation Statement to record unpresented cheques and deposits not yet processed

Regular **reconciliation reports may include:**
- once a month
- as bank statements arrive

Designated timelines **may include:**
- deadline set by supervisor
- deadline set by accounting department
- enterprise deadline

Credit journals may include:
- sales journal
- purchases journal
- sales returns journal
- purchases returns journal

Range of Variables

Transaction documents may include:
- sales invoices
- purchase invoices
- sales credit notes
- purchase credit notes

Cross checking and proofing journals may include:
- checking for accuracy of transposed data
- checking against source documents
- checking by supervisor

Rectifying errors may include:
- careful noting of errors
- informing supervisor
- correcting errors following *enterprise policies and procedures*

Individual debtor and creditor records may include:
- debtors' subsidiary ledger
- debtors' schedule
- creditors' subsidiary ledger
- creditors' schedule

Transaction journals may include:
- sales and sales returns journal/s
- cash receipts journal
- purchases and purchase returns journal/s
- cash payments journal

Identifying discrepancies in accounts may include:
- careful cross checking between accounts and source documents
- proofreading

Preparation and reconciliation of schedule within *designated timelines* may include:
- deadline set by management
- deadline set by accounts department
- deadline set by supervisor
- monthly

Evidence Guide

Critical aspects:
- range of cash journals are identified and their purpose and function understood
- appropriate source documents are identified
- relevant information within source documents is identified
- relevant information is transferred accurately into cash journals
- journals are cross checked and checked against source documents for accuracy
- errors are identified
- corrections within own scope of responsibility are made according to *enterprise policies and procedures*
- corrections outside of scope of own responsibility are referred to the appropriate authority
- cash journals are totalled accurately according to *enterprise policies and procedures*
- information is recorded in chronological order
- cash is handled according to *enterprise policies and procedures*
- different credit journals are identified and their purpose and function understood
- information from source documents is transferred accurately into credit journals
- credit journals are cross-checked , proofread and checked against source documents to ensure they are accurate
- errors in credit journals are reported to appropriate person and rectified according to *enterprise policies and procedures*
- discrepancies between transaction documentation and account entries are identified
- accounting records are checked for accuracy against the bank's accounting records
- reconciliation occurs according to *enterprise policies and procedures*
- direct debits and credits are entered into cash journals accurately
- discrepancies are identified and if within own scope of responsibility are resolved, or are referred to an appropriate authority
- bank charges and interest are identified and recorded in the cash journal
- adjustments are made to the cash journal to account for discrepancies and differences between the bank statement and the journal as directed
- when debtors' cheques are dishonored cash receipts journal is adjusted accordingly
- bank reconciliation statements are prepared accurately within *designated timelines*
- time is allowed for cheques to clear and be credited
- the total on the adjusted bank balance on the Bank Reconciliation Statement matches the total in the enterprise's ledger
- regular reconciliation reports are produced within *designated timelines*
- debtor's information is entered into individual debtor's subsidiary ledger
- creditor's information is entered into individual creditor's subsidiary ledger
- discrepancies are identified in individual debtor and creditor accounts
- errors are reported to appropriate person and rectified according to enterprise *policies and procedures*
- debtors' and creditors' schedule is prepared according to *enterprise policies and procedures*
- schedule is reconciled within *designated timelines*
- appropriate Australian Accounting and Auditing Standards are adhered to
- any irregularities are referred to an appropriate authority and clarification is sought in relation to any necessary directions

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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:
- cash journals
- credit journals
- debtor's and creditor's ledgers
- workplace reference materials such as procedural manuals and company policy
- calculator
- computer equipment and relevant 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.

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 accounting system and procedures
- *enterprise policies and procedures* across the range of tasks required
- relevant source documents and information contained within source documents
- definition of credits/creditors and debits/debtors
- cross-checking techniques
- limit of scope of own responsibility

Skills
- literacy: reads and understands an enterprise's financial procedures; selects and applies the procedures and strategies needed to perform a range of tasks after reading appropriate texts; follows sequenced written instructions
- numeracy: uses knowledge of mathematical concepts; calculates with time; interprets, compares and calculates with whole numbers and money; decimal fractions and percentages in some unfamiliar contexts
- problem solving: uses some approximation with reference to relevant experience to check for discrepancies
- communication: listens to and follows oral instructions; questions to clarify information
- proofreading: checks calculations

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

BSAFIN302B   Monitor cash control for accounting purposes

This Unit covers monitoring cash flow, making and receiving payments, debtors and creditors and following up accounts.

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

Element of Competency	Performance Criteria
Receive and document payments/takings	• Cash is correctly counted and, where applicable, correct change is given • Cheque and credit card payments are verified with the *nominated person/department* prior to acceptance • Receipts are accurately completed and issued
Check and despatch invoices and statements to debtors	• Debtor statements are checked for accuracy of content • Invoices are validated against financial records • Any noted discrepancies are rectified • Debtor invoices are despatched within *designated timelines*
Follow up outstanding accounts	• Outstanding accounts are collected within *designated timelines* • Credit terms are reviewed and controlled to ensure payment within *designated timelines* • Debtors' ledger is maintained accurately to reflect the correct situation • Credit terms are reviewed when debtor accounts are rectified

Check and despatch payments to creditors	• Payment documentation is checked for accuracy of information and dispatched to creditors within *designated timelines*
	• Cash, cheque and credit card payments are made according to *enterprise guidelines*
	• Creditors' statements are reconciled with accounting records
	• Relevant data is corrected in creditor's account

Range of Variables

Correctly counting cash and giving correct change may include:
- deducting discount if appropriate
- counting cash in customer's presence
- leaving cash in view of customer whilst entering transaction
- counting change before cash is put into register
- counting out change with customer
- checking notes are not stuck together

Verifying cheque payments may include:
- cheque is signed
- dated with current date
- figures and words match
- checking cheques are written to correct payee
- following enterprise *procedures* for accepting cheque payments

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Verifying credit card payments may include:
- checking customer's signature against sample signature
- checking expiry date of card
- checking against stolen credit card list
- following *enterprise policies and procedures* for accepting credit card payments

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Nominated person/department **may include:**
- supervisor
- credit card authorisations
- bank
- enterprise authorisations department

Accurately issuing receipts may include:
- recording date payment was received
- writing amount of money received (in words and figures)
- creating a receipt number
- documenting payer
- documenting payee
- signature of person receiving money or the designated person
- brief description of the transaction
- producing two copies of receipt
- issuing original receipt to person making payment
- receiver keeping duplicate

Range of Variables

Debtor statements may include:
- manual system
- computerised system
- name and address of supplier
- name and address of client/debtor
- month to which statement is applicable
- opening balance if applicable
- information about any sales, sales returns, credit, forward orders and payments which have occurred throughout the month
- final balance with overdue details if appropriate
- any payments received allocated on an invoice by invoice basis
- discount policy

Checking accuracy of content may include:
- particulars of statement are correct
- calculations are correct
- information in statement is clear and reliable
- data matches that found in individual debtor's subsidiary ledger account

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Validating invoices may include:
- invoice has been printed in duplicate to provide all details according to legislative requirements
- checking the goods were ordered by the debtor
- checking the goods have been or are being sent to the debtor
- all calculations and extensions are correct
- checking terms of the invoice are correct
- completing credit check prior to giving credit to debtor
- credit has not been extended beyond an existing debtor's credit limit
- supervisor or another independent person checking invoices
- validating person signing validation slip

Discrepancies may include:
- reporting error to supervisor
- correcting error before invoice is despatched
- notifying debtor if invoice has already been forwarded
- crediting debtor's account for amount of incorrect invoice
- producing and dispatching correct invoice

Dispatched within *designated timelines* may include:
- despatched with the goods
- despatched as soon as possible after debtor purchases goods
- enterprise deadline

Range of Variables

Collecting outstanding accounts within *designated timelines* may include:
- within agreed period
- within enterprise deadline
- by month end

Corrective action may include:
- follow up letter
- telephone call
- fax
- visit
- suspension/cancellation of credit terms
- referral to debt collection agency

Credit terms are reviewed and controlled may include:
- on a weekly basis to highlight slow and non-payers
- reducing the amount of credit available to the debtor
- communicating with debtor
- charging interest to outstanding accounts

Debtors' ledger is maintained accurately may include:
- identifying how long an account has not been paid
- allocating payments to the oldest balances first
- allocating payments to the individual invoice

Payment documentation may include:
- cheque
- credit card details
- cash
- direct debit advice

Accuracy of information may include:
- matching purchase order details against delivery docket, invoice or credit note
- checking all calculations and extensions are correct

Despatched within *designated timelines* may include:
- within agreed period
- monthly
- enterprise deadline

Range of Variables

Payments made according to *enterprise guidelines* may include:
- follow *enterprise policies and procedures* for drawing cheques/ using credit card
- having cheques signed
- sending remittance advice with cheque/credit card

Reconciling with accounting records may include:
- matching creditor statement with invoices received
- only paying on the invoice if the invoice appears on the statement

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Correcting relevant data may include:
- notifying creditor immediately
- notifying in writing
- requesting an amended invoice prior to payment
- notifying supervisor
- adjusting relevant accounting records

Evidence Guide

Critical aspects:
- when customer pays by cash, cash is counted in customer's presence
- cash is left in full view and change is counted out correctly, if applicable
- when customer pays by cheque, cheque is checked to ensure it is signed, dated, and the correct amount is written in both words and figures
- when customer pays by credit card expiry date, stolen credit card list and expiry date are checked
- cash, cheque and credit card takings are documented correctly
- receipts are completed accurately according to *enterprise policies and procedures*
- receipts are issued immediately
- invoice is prepared and checked for accuracy
- completed invoices are checked for errors and any errors within scope of own responsibility are corrected according to *enterprise policies and procedures*
- errors outside own scope of responsibility are referred to an appropriate authority for rectification
- prepared invoice is checked by appropriate person
- correct invoices are despatched promptly within *designated timelines*
- debtor statements are checked to ensure all details are correct
- outstanding accounts are monitored and are collected within *designated timelines*
- debtor is notified/reminded of enterprise's account payment policies, if appropriate
- debtors ledger is maintained correctly and reflects the current situation
- debtors' payments are controlled according to *enterprise policies and procedures*
- debtors are balanced and reconciled according to *enterprise policies and procedures*
- enterprise's credit terms are understood and applied
- goods received are checked against all documentation including invoice
- checks to ensure that the delivery docket, invoice and credit note match the purchase order
- invoices are reconciled with statement according to *enterprise policies and procedures*
- cash payments are only made when written instructions are received and receipt is retained
- when mailing cheque, remittance advice is included with payment
- credit card payments are made according to *enterprise policies and procedures*
- creditors are notified immediately any errors in creditors' invoices are found and relevant data is corrected in creditor's account
- payments made to creditors are accurate and recorded
- appropriate legislative procedures are followed

Resource implications:
The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:
- workplace reference materials such procedural manuals and company policy
- cash journals
- general journals
- subsidiary ledgers or general ledger
- receipt books
- credit card facilities
- calculator
- computer equipment and relevant software

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

Evidence Guide

Underpinning knowledge and skills

Knowledge
- enterprise accounting system and procedures
- *enterprise policies and procedures* across the range of tasks required
- relevant source documents and information contained within source documents
- definition of credits/creditors and debits/debtors
- cross-checking techniques
- limit of scope of own responsibility
- ATO regulations
- consumer law
- Australian Accounting and Auditing Standards

Skills
- literacy: reads and understands an enterprise's financial procedures; follows sequenced written instructions; selects and applies the procedures and strategies needed to perform a range of tasks; uses basic model to produce accurate invoice
- numeracy: uses knowledge of mathematical concepts; calculates with time; compares and calculates with whole numbers and money; decimal fractions and percentages in some unfamiliar contexts; adheres to designated timelines
- communication: listens to and follows oral instructions; questions to clarify information; refers errors or discrepancies to appropriate person
- proofreading: checks calculations

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

BSAFIN303B   Monitor stock levels to maintain enterprise activities

This Unit covers the purchase and storage of common enterprise stationery, and maintaining these records.

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

Element of Competency	Performance Criteria
Monitor and maintain stock levels	- Determined optimum stock levels are maintained to ensure constant productivity - Purchase, receipt, storage and issue of stock is undertaken when required - Stock is valued using the *nominated valuation method*, if required - Stock levels are reconciled with paperwork and any discrepancies rectified or reported to *nominated person/section* within *designated timelines*
Maintain stock control records	- Records are checked against original orders - Records are updated and maintained in an accurate manner to ensure confidentiality and security of information - Records are kept for the *necessary period*

Range of Variables

Stock items may include:
- invoices, receipts, delivery dockets
- letterhead, paper, envelopes
- computer disks
- printer refills
- pens and pencils, staples, scissors, glue
- tea, coffee, sugar

Optimum stock levels may include:
- ordering in economic quantities
- economic re-ordering points
- safe stock quantities

Constant productivity may include:
- not running out of stock
- stock does not become obsolete
- stock does not deteriorate
- stock is accessible

Purchase and control of stock may include:
- responsibility of purchasing officer, office manager or administration support personnel
- prepare purchase order
- send order to supplier
- delivery of goods
- purchase order checked against delivery docket and invoice
- physical check of goods delivered

Storage of stock may relate to:
- convenience of access
- protecting from damage and deterioration
- protecting from theft
- regular monitoring

Issuing stock may include:
- by authorised person
- stock requisition form
- *enterprise policies and procedures*

Range of Variables

Nominated valuation method **may include:**
- first in first out
- last in first out
- average cost
- lower cost
- net realisable value

Reconciling stock records may include:
- physical stock count
- matching physical count against records
- obtaining relevant data

Stock discrepancies may include:
- theft or pilferage
- breakage or other damage
- deterioration of the product
- error in recording
- failure to check incoming stock against delivery docket
- obsolescence resulting in stock having to be discarded

Rectifying discrepancies may include:
- updating records to show correct amount
- adjusting financial accounting records
- adjusting stock records
- informing supervisor or appropriate person

Nominated person **may include:**
- supervisor
- purchasing officer
- office manager

Stock control records may include:
- inventory cards
- purchase orders/requisitions
- invoices
- delivery dockets

Recording mechanisms may include:
- paper-based
- electronic
- enterprise accounting system

Range of Variables
Updating and maintaining records may include: • keeping continuous record of incoming and outgoing stock • adjusting records as appropriate • informing appropriate personnel/ department
Ensuring confidentiality and security of information may include: • archiving records • following enterprise security procedures
Kept for *necessary period* may include: • 5 years (ATO legislation) • 7 years (ASC requirement) • enterprise specification

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Evidence Guide

Critical aspects:
- costs associated with stock are identified and importance of keeping costs low is understood
- Economic Order Quantity (EOQ) is understood and optimum quantity of stock is established
- economic re-order point is calculated
- optimum stock levels are maintained
- safe-stock levels are maintained according to *enterprise policies and procedures*
- when ordering stock purchase order is prepared correctly and sent to supplier
- when goods are delivered purchase order is prepared correctly and sent to supplier
- when goods are delivered purchase order is checked against the delivery docket and invoice
- delivered goods are checked for correct quantity and quality
- stock is stored in a safe and accessible location according to *enterprise policies and procedures*
- stock is monitored to prevent loss through deterioration or obsolescence
- *enterprise policies and procedures* for issuing stock are followed
- stock levels are monitored using the nominated stock control system
- stock is valued using the nominated valuation method
- physical stock count is undertaken periodically and amount of stock matches records
- when discrepancy between actual stock and records occur, discrepancy is investigated and if within scope of own responsibility rectified
- if discrepancy is outside scope of own responsibility, it is referred to an appropriate authority
- records are updated to reflect correct figures according to *enterprise policies and procedures*
- records are kept for the necessary period

Resource implications:
The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:
- *enterprise policies and procedures* manual
- recording mechanism, computer software/paper-based
- relevant standards and legislation
- source documents, such as purchase requisitions, invoices, receipts, delivery dockets, inventory cards

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

Evidence Guide

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

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

Underpinning knowledge and skills

Knowledge
- *enterprise policies and procedures* across the range of tasks required
- stock valuation methods
- stock security methods
- stock management/stock taking methods
- Australian Accounting and Auditing Standards
- ATO regulations
- definitions of credit/creditors and debit/debtors
- appropriate record keeping
- reconciliation techniques
- cross-checking techniques

Skills
- literacy: reads and understands *enterprise policies and procedures* with regards stock; selects and applies the procedures and strategies needed to perform a range of tasks; follows sequenced written instructions
- numeracy: uses knowledge of mathematical concepts; calculates with time; selects, totals and orders items in bulk within budgetary constraints; estimates, compares and calculates with whole numbers and money; decimal fractions and percentages in some unfamiliar contexts
- communication: listens to and follows oral instructions; questions to clarify information; refers discrepancies to appropriate person
- proofreading: checks stock and calculations
- problem solving: uses a number of different pieces of mathematical information; uses some approximation with reference to relevant experience to check that the outcome fits task; 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	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

BSAFIN304B   Process payroll

This Unit covers the processing of payroll from provided data.

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

Element of Competency	**Performance Criteria**
Process payroll	• Employee pay period details, deductions and allowances are entered
	• Payment due to individual employees is calculated with data provided
	• Total wages for pay period are reconciled
	• Pay advice slips for individual employees are prepared
	• Salaries and wages are prepared and presented for authorisation
	• Salaries and wages are issued within *designated timelines*
	• Records are kept and maintained for taxation and auditing purposes
	• *Designated* security procedures are followed at all times to ensure confidentiality and security of information
	• Enquiries about salaries and wages are dealt with promptly and courteously

Range of Variables

Pay period details may include:
- salary
- wage
- casual wage
- contract
- piecework

Deductions and allowances may include:
- income tax
- superannuation contributions
- health insurance
- union dues
- travel allowance
- car allowance
- meal allowance

Source data may include:
- employee records/history
- employee earnings and payroll register
- employee timesheets

Reconciling total wages may include:
- checking calculation of pay is correct
- checking gross pay equals net pay plus any deductions

Pay advice slips may include:
- name of employee and enterprise name
- tax file number
- rate of pay
- pay period
- type of employment
- gross pay
- normal hours and overtime worked
- all deductions and allowances (eg. leave, superannuation)
- net pay

Presented for authorisation may include:
- forwarding to appropriate person to check
- forwarding to appropriate person to authorise
- following *enterprise policies and procedures*

Range of Variables

Issued within *designated timelines* may relate to:
- award requirement
- enterprise agreement
- individual contracts

Taxation and recording purposes may include:
- Australian Accounting and Auditing Standards
- ATO legislation
- enterprise guidelines, *policies and procedures*

***Designated* security procedures may include:**
- supervision of timesheets
- numbering of payroll registers
- keeping payroll documents secure
- division of labour
- employees signing when pay is received
- specific enterprise security procedures
- ensuring no money is lost from enterprise
- no employee is put at risk when handling large amounts of cash

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Ensuring confidentiality and security of information may include:
- only genuine employees are paid
- employees are paid the correct amount
- any overtime claimed has been worked
- no disclosure of payroll or employee details to unauthorised personnel

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Dealing with enquiries may include:
- recording the enquiry
- remaining professional and polite
- referring person to supervisor or appropriate person
- resolving simple enquiries
- reporting to supervisor
- informing person enquiring when they can expect a resolution
- investigating complex enquiries as quickly as possible
- following *enterprise policies and procedures*

Evidence Guide

Critical aspects:
- basic accounting processes and procedures are understood and demonstrated
- enterprise's payroll system is operated correctly (paper-based/electronic)
- data in employee's timesheets/source documents is accurately recorded
- gross pay, deductions and net pay are calculated correctly for each employee
- total wages are reconciled so that gross pay for the period equals the total deductions plus net pay
- when calculations do not reconcile, they are checked
- irregularities are reported to appropriate personnel for resolution
- payroll is prepared within *designated timelines*
- employee pay slips are generated and authorisation gained
- prepared payroll is checked by appropriate authority
- any amendments are understood and pay slip/payroll is amended accordingly
- clarification is sought as required
- details are recorded according to *enterprise policies and procedures*
- records are checked for accuracy and are kept up-to-date for accounting and auditing purposes
- *enterprise policies and procedures* for paying employees are understood and adhered to
- if wages are paid in cash, cash cheque is prepared for total amount of net wages and cash analysis sheet is prepared to keep physical size or pay packets to a minimum
- if employees are paid by cheque, cheque for each employee is prepared according to *enterprise policies and procedures*
- if wages are electronically transferred to employees, procedures for payment by EFT are understood and adhered to
- pay slips are delivered to employees within *designated timelines*
- security procedures are followed at all times to ensure confidentiality and security of information
- employee enquiries regarding pay are dealt with promptly and those within own scope of responsibility are appropriately resolved, those outside scope of own responsibility are referred to an appropriate authority
- appropriate legislative procedures are followed

Resource implications:
The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:
- workplace reference materials such procedural manuals and company policy
- calculator
- computer equipment and relevant software
- payroll data from preceding pay periods

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
- relevant Australian Accounting and Auditing Standards
- relevant ATO legislation
- *enterprise policies and procedures* across the range of tasks required
- enterprise payroll system
- enterprise's security and confidentiality procedures
- preparation of cheques

Skills
- literacy: reads and understands enterprise's financial *policies and procedures* and appropriate legislative procedures, writes cheques or salary authorisations; prepares pay advice slips; maintains records
- numeracy: calculates gross and net pay, compares differing rates of pay over a given time span of the same nature, prepares cash analysis sheets, reconciles figures
- communication: answers enquiries, listens and questions to elicit information; refers discrepancies to supervisor
- problem solving: reconciles figures, resolves employee enquiries within scope of own responsibility
- proofreading: checks for accuracy
- time management: adheres to designated timelines

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

BSAFIN305B   Maintain financial records for reporting purposes

This Unit covers making entries into the general journal, posting journals into the general ledger and preparing a trial balance from the general ledger.

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

Element of Competency	Performance Criteria
Maintain data for general journal purposes	• Transactions are posted into general journal
Maintain general ledger	• Journals are posted into general ledger • Debtors' and creditors' systems are reconciled with general ledger • Trial balance is prepared from general ledger

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Range of Variables

General journal transactions may include:
- purchase of a fixed asset on credit
- sale of a fixed asset on credit
- correction of posting errors
- write-off of a bad debt
- interest expense
- interest receivable
- commencing business entries
- withdrawal of stock/assets by owner
- non-cash transactions (eg. writing off depreciation, stock losses)

Source journals for general ledger may include:
- cash receipts journal
- cash payments journal
- sales journal
- sales return journal
- purchases journal
- purchases returns journal
- general journal

Reconciling debtors'/creditors' systems may include:
- checking accuracy of debtor account balances (eg. cash receipts journal, sales return journal, general journal)
- checking accuracy of creditor account balances (eg. cash payments journal, purchases journal, purchases returns journal, general journal)
- checking the total of the debtor's schedule equals the balance of the debtor's control account
- checking the total of the creditor's schedule equals the balance of the creditor's control account

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Preparing trial balance may include:
- listing the ledger accounts in the general ledger
- entering debit balance amounts in debit column
- entering credit balance amounts in credit column
- ensuring total of debit and credit columns are equal
- dating

Evidence Guide

Critical aspects:
- relevant transactions are identified and can be located from source journals
- the relationship between the source journals and the general journal is understood and can be explained
- the purpose of the general journal is understood and can be explained
- the process of entering transactions into the general journal is understood
- the relationship between the general journal and the general ledger is understood and can be explained
- postings from the general journal to the general ledger are accurate and are double checked
- entries to the general journal and general ledger are legible
- debtor and creditor account balances are checked
- reconciliations are completed within *designated timelines*
- trial balance is accurately prepared and all figures are double checked
- trial balance balances
- any irregularities are identified and, if within scope of own responsibility, are rectified
- any irregularities outside scope of own responsibility are referred to an appropriate authority
- clarification is sought in relation to any directions as required

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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 policy and procedures manual
- relevant standards and legislation
- source journals
- accounting system, paper-based, electronic

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 accounting system and procedures
- *enterprise policies and procedures* across the range of tasks required
- relevant source documents and information contained within source documents
- definition of credits/creditors and debits/debtors
- cross-checking techniques
- limit of scope of own responsibility

Skills
- literacy: reads and understands an enterprise's financial procedures; selects and applies the procedures and strategies needed to perform a range of tasks; follows sequenced written instructions
- numeracy: interprets, uses knowledge of mathematical concepts; compares and calculates with whole numbers and money; decimal fractions and percentages in some unfamiliar contexts; uses a combination of oral and written mathematical and general language for the record keeping process
- communication: listens to and follows oral instructions; questions to clarify information
- proofreading: checks calculations
- problem solving: uses a number of different pieces of mathematical information

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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	2	2	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

BSAMED301A Use advanced 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 advanced 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 advanced medical terminology	• Written and oral instructions using advanced medical terminology are received, understood and documented • Checklists are used where appropriate • Abbreviations for specialised medical terms and associated processes are understood • The *policies and procedures* of the medical practice are understood and adhered to • Clarification is sought when necessary
Carry out routine tasks	• Advanced medical terminology is used correctly in the completion of routine tasks • Assistance is sought from *designated person* as required
Use appropriate advanced medical terminology in oral and written communication with patients, fellow workers and health professionals	• Appropriate advanced medical terminology is used as directed in oral communication with patients, fellow workers and health professionals • Appropriate advanced medical terminology is used as directed in written communication with patients, fellow workers and health professionals • Written communication is presented to a *designated person* for verification if required • Advanced medical terminology is spelt and pronounced correctly • Advice is sought from *designated person* with regard to advanced medical term/s and accompanying process/es

Range of Variables

Advanced medical terminology may include:
- knowledge of medical specialties and the names and titles of doctors working in specialist fields
- causes to changes in the systems of the body (eg. changes to the musculo-skeletal system may include inflammation due to repeated strain on the system)
- illnesses
- injuries
- diseases
- interrelated functions of the body, locations and diseases (eg. functions of the skeletal system, locations of skeletal injuries, skeletal diseases
- terms to describe onset and/or nature of disease
- medical conditions
- medical investigations and procedures
- abbreviations for medical and pharmacological terms (eg. BCG, HRT, IVP, tab, ante, ung)
- medical equipment and instruments
- departments/sections in a hospital
- medications
- health insurance terminology
- Medicare terminology
- referrals

Written and oral instructions may include:
- notices
- drugs orders
- instructions for postoperative care
- patient notes
- routine reports
- test results
- referrals
- OHS signs and instructions
- diary entries
- theatre lists
- telephone calls
- verbal instructions

Range of Variables

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 information to patients
- maintaining information to assist patients
- maintaining reception area, waiting room, consultation room
- ordering stock (eg. stationery, medical supplies)
- recording information
- preparing reports
- contributing to meetings
- answering patient enquiries
- dealing with patient complaints
- producing a range of complex medical documents (eg. patient history, case report)

Oral communication may include:
- verbal instructions
- confirming appointments
- answering routine telephone enquiries
- dealing with difficult patients/customers
- transferring calls
- paging staff
- reporting to staff at meetings
- communicating with a range of medical/hospital professionals on patient related matters

Written communication may include:
- memoranda
- letters
- minutes
- forms
- complex correspondence to a range of medical/hospital professionals on patient related matters
- patient history questionnaires
- patient records
- appointment diaries, cards
- telephone messages
- patient histories
- case reports

Range of Variables

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
- 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
- drug and prescription information sources/databases
- office practice manual
- relevant handbook
- designated person

Evidence Guide

Critical aspects:
- abbreviations for medical terms and associated processes are identified and used where appropriate
- advanced medical terminology is spelt and pronounced correctly
- communication is carried out in a professional manner using appropriate communication strategies
- 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 and presented to *designated person* for approval if required

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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

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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

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Evidence Guide

Underpinning knowledge and skills

Knowledge
- office practice manual
- advanced medical terminology
- relevant local/state/federal legislation
- own and others' responsibilities
- appropriate forms and recording requirements
- appropriate external agencies
- appropriate information sources

Skills
- literacy: follows medical procedures, policies, signs and instructions, uses correct spelling, grammar and punctuation
- following routine oral and written sequenced instructions
- language: relays information, uses appropriate and correct medical terminology, uses correct pronunciation and sentence structures; questioning to clarify terms and context
- interpersonal: interacts with patients and others in an appropriate manner
- research: increases own knowledge of medical terminology

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
2	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

BSAMED302A Apply knowledge of the medical fee structure to prepare and process medical accounts

This Unit covers providing advice to patients regarding fee structures, processing referrals, and preparing and processing medical accounts for a range of patients.

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

Element of Competency	Performance Criteria
Provide advice to patients about fee structure	- Medicare entitlement system is understood and explained - Private insurance rebate system is understood and explained - Schedule fees for different services are identified - Patients are correctly advised regarding applicable fee structures - Patient entitlements are correctly communicated to patient
Process referrals to specialist practitioners	- Referrals are checked to ensure validity - Correct procedures for referral of Veterans' Affairs, worker's compensation and motor vehicle third party patients are followed - Referral letters are filed according to legislation and office *policies and procedures* if required

Element of Competency	Performance Criteria
Prepare and process medical accounts for bulk billed and private patients	• Bulk billing procedures are identified and understood • Private accounts procedures are identified and understood • Correct procedures for preparing Veterans' Affairs, worker's compensation and motor vehicle third party accounts are followed • Medicare Benefits Schedule book is correctly used • Services which are not eligible for Medicare rebate are identified and costed appropriately • Appropriate stationery is selected and completed according to enterprise and legislative requirements • Medical account is forwarded to *designated person or organisation* according to legislation and office *policies and procedures*
Process accounts	• Payments are received and documented • Procedures for patients without Medicare card or number are used where necessary • Receipts are prepared and issued to person or authority according to legislation and office policies and procedures • Medicare payments are reconciled with claims made by the medical practice • Overdue accounts are followed up
Provide financial information for the practice as required	• Financial records are provided in required format as requested • Financial data is stored and archived in accordance with the *policies and procedures* of the medical practice

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Range of Variables

Fee structures may relate to:
- Medicare (hospital, medical)
- scheduled fees
- refund only
- AMA recommendations
- workers compensation
- Department of Veterans' Affairs
- services with no fee structures
- advice to patients
- Transport Accident Commission
- insurance medical reports
- provision of repeat prescriptions
- provision of legal and other reports
- provision of copies of medical files
- services provided to Divisions of General Practice
- Worker's Compensation
- other services provided by the clinic
- other items sold to patients (eg. immunisations, dressings)

Patient entitlements may relate to:
- Medicare
- Private health funds (level of cover, restrictions)
- Department of Veteran's Affairs
- Transport Accident Commission
- Worker's Compensation

Processing referrals may include:
- entering patient details into computer system
- filing patient notes
- maintaining patient information
- word processing
- checking for 'acceptable evidence' (eg. name of referring doctor, address or service provider number of the referring doctor)
- checking that the referral is valid (eg. the length of time stated in the referral has not been exceeded)
- recording information

Range of Variables

Bulk billing, private and other accounts procedures may relate to:
- Medicare provider numbers
- Medicare item numbers
- patient details
- Health Care cards
- treatment vouchers
- additional information
- forms
- vouchers
- item numbers of services
- descriptions of services
- explanatory notes
- levels of fees
- attachments
- referrals
- name of hospital
- name of service provider
- dates and names
- payment options
- medical certificates
- workers compensation
- claims
- Department of Veteran's Affairs items of service
- services that are consultation items, and those that are procedural items

Appropriate stationery may include:
- forms
- enterprise's templates (eg. for accounts, accompanying reports)
- vouchers
- receipts
- accounts
- invoices
- statements
- reports

Range of Variables

Legislation may relate to:
- relevant state and federal legislative acts
- privacy
- negligence
- malpractice
- consent
- equal opportunity
- workers compensation
- OHS
- duty of care

Appropriate person or organisation may include:
- patient
- guardian
- Health Insurance Commission
- Transport Accident Commission
- Department of Veteran's Affairs
- AMA
- Worker's Compensation Organisations

Policies and procedures may include:
- correspondence format
- office practice manual
- security, confidentiality and privacy procedures
- recording information
- accessing and updating files
- information specific to the enterprise
- abiding by state and federal legislation
- following instructions
- end of session, end of day, end of week, end of month and end of year procedures
- bank reconciliations and preparing banking documentation
- managing particular Medicare problems (eg. lost cards, new-borns, foreign national, new card numbers, patients separating from family cards)
- management of provider numbers for doctors
- RACGP Code of Practice for the Management of Health Information in General Practice
- RACGP Entry Standards for General Practices

Range of Variables

Account processing procedures may relate to:
- Medicare provider numbers
- Medicare item numbers
- patient details
- Health cards
- additional information
- forms
- vouchers
- item numbers of services
- descriptions of services
- explanatory notes
- levels of fees
- attachments
- referrals
- name of hospital
- name of service provider
- dates and names
- payment options
- receipts
- overdue accounts
- medical certificates
- workers compensation
- claims
- reconciliation of claims and payments
- debt collection

Financial information may relate to:
- statistics
- overdue accounts
- credits and debit amounts
- payment history
- payments received
- types of payments and related documentation/reports (eg. credit card payments, EFTPOS)

Required format may include:
- general ledger
- overdue debtors list/report
- daily/weekly summaries/reports
- statements
- receipt book
- computerised billing software
- Medclaims (electronic billing of Medicare)

Range of Variables
Procedures for storing and archiving files may relate to: • date order • period of storage • storage conditions

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Evidence Guide

Critical aspects:
- fee schedules are understood and applied appropriately
- payment systems are understood and applied appropriately
- correct information regarding fee structures is supplied to patients
- communication is carried out in a professional manner using appropriate communication strategies
- accounts are prepared correctly and accurately using a range of billing procedures
- correct codes, titles, descriptions and amounts are used
- Medicare Benefits Schedule is used correctly
- appropriate stationery and format are used to prepare accounts, receipts, reports and other documents
- accounts are forwarded to appropriate person/organisation within designated timelines
- accounts are processed correctly and receipts issued
- overdue accounts are followed up according to enterprise policies and procedures
- claims and payments are reconciled
- financial information is provided as requested, in requested format
- financial information is accurate
- confidentiality, security and privacy of information is maintained
- activities and actions are carried out within 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, numerical errors, grammatical mistakes and missing words

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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

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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

Evidence Guide

Underpinning knowledge and skills

Knowledge
- Health Care system
- Medicare
- health insurance systems
- fee schedules
- codes for services
- referral process
- enterprise billing process
- bulk billing process
- relevant regulatory and legislative requirements
- Transport Accident Commission
- Worker's Compensation

Skills
- literacy: reads and understands office's financial procedures; selects and applies the procedures and strategies needed to perform a range of tasks; follows sequenced written instructions; locates specific information in a range of bureaucratic documents
- numeracy: applies basic financial and accounting procedures; files documents; interprets information from data presented in tables, graphs and diagrams
- communication: listens to and follows sequenced oral instructions; communicates professionally and clearly with patients, with due allowance for patient's difficulties in understanding
- proofreading: checks calculations, invoices and fee structures
- professionalism: abides by medial rules on integrity and confidentiality

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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