



**Australian Government**

# **SIRXADM001A Apply retail office procedures**

**Revision Number: 2**

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### **Modification History**

The version details of this endorsed unit are in the table below. The latest information is at the top.

<b>Release</b>	<b>Comments</b>
Second Release	Editorial updates

### **Unit Descriptor**

This unit describes the performance outcomes, skills and knowledge required to apply retail office procedures. It involves processing mail, operating office equipment, filing and retrieving documents, establishing contact with customers and preparing simple correspondence.

### **Application of the Unit**

This unit applies to sales and administrative staff who operate and maintain office equipment, receive and dispatch correspondence in a variety of formats, file and retrieve documents, communicate with internal and external customers, and prepare simple correspondence according to store policy and procedures.

### **Licensing/Regulatory Information**

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

### **Pre-Requisites**

Nil

### **Employability Skills Information**

This unit contains employability skills.

## Elements and Performance Criteria Pre-Content

### Elements and Performance Criteria

Element	Performance criteria
Elements describe the essential outcomes of a unit of competency.	Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.
1. Process incoming and outgoing mail.	1.1. <b><i>Sort and dispatch incoming mail</i></b> to nominated recipients or locations. 1.2. Collect and check outgoing mail to ensure all items are correctly prepared for dispatch. 1.3. Record mail according to <b><i>store policy and procedures</i></b> . 1.4. Dispatch mail within designated time limits.
2. Process bulk mail.	2.1. Collate documents as required. 2.2. Sort and batch envelopes according to Australia Post specifications. 2.3. Lodge batched items for delivery.
3. Operate office equipment.	3.1. Identify appropriate <b><i>equipment</i></b> for intended application. 3.2. Operate equipment according to manufacturer instructions. 3.3. Identify and rectify equipment faults or report to <b><i>relevant personnel</i></b> . 3.4. Follow opening and shutdown processes according to store procedures. 3.5. Apply maintenance program for equipment to ensure down time is minimised.
4. File and retrieve documents.	4.1. <b><i>File documents</i></b> according to store policy. 4.2. Identify and retrieve documents as requested. 4.3. Update and modify existing records. 4.4. Remove, process and store designated inactive files according to store policy.
5. Establish contact with internal and external customers.	5.1. Use telephone system functions according to store policy. 5.2. Obtain and accurately record telephone and fax number or email <b><i>address</i></b> . 5.3. Answer incoming calls promptly and according to store policy. 5.4. Establish and clearly convey purpose of <b><i>contact</i></b> . 5.5. Transfer or place calls on hold as required. 5.6. Keep customers informed of delays and action being taken. 5.7. Record messages accurately and promptly return calls if

required.

- 6. Prepare simple correspondence.
  - 6.1. Prepare and present correspondence for approval or signature according to set timeframes.
  - 6.2. Write text using clear, concise language.
  - 6.3. Use correct spelling, punctuation and grammar.
  - 6.4. Use standard form letters according to store policy.

## Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

### Required Skills

- technical skills to operate a range of office technology
- planning and organising skills to complete tasks in a set timeframe
- literacy and numeracy skills to:
  - process, record and document information
  - generate a range of retail documents
- interpersonal communication skills to:
  - report equipment faults
  - answer telephone calls and keep customers informed of delays and action being taken through clear and direct communication
  - ask questions to identify and confirm requirements
  - share information
  - use language and concepts appropriate to cultural differences
  - use and interpret non-verbal communication

### Required Knowledge

- store policy and procedures in regard to:
  - store administration and clerical systems
  - receiving and dispatching incoming and outgoing mail
  - processing information
  - reporting problems and faults
- relevant regulatory and licensing requirements, such as:
  - Work Health and Safety (WHS)
  - privacy policies

## Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, the range statement and the Assessment Guidelines for this Training Package.

### **Critical aspects for assessment and evidence required to demonstrate competency in this unit**

Evidence of the following is essential:

- applies procedures for the processing of mail, including bulk mail
- operates and maintains office equipment according to store policy and procedures
- files and retrieves documents according to store policy and procedures
- follows procedures for establishing contact with internal and external customers
- applies procedures for the preparation of simple correspondence.

### **Context of and specific resources for assessment**

Assessment must ensure access to:

- a real or simulated work environment
- relevant documentation, such as:
  - store policy and procedures manuals
  - manufacturer instructions and operation manuals
- a range of retail equipment.

### **Methods of assessment**

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- observation of performance in the workplace
- a role play
- third-party reports from a supervisor
- customer feedback
- answers to questions about specific skills and knowledge
- review of portfolios of evidence and third-party workplace reports of on-the-job performance.

### **Guidance information for assessment**

Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:

- SIRXICT001A Operate retail technology
- SIRXFIN002A Perform retail finance duties.

## Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. ***Bold italicised*** wording in the performance criteria is detailed below.

Procedures to ***sort and dispatch incoming mail*** may relate to:

- internal systems
- Australia Post
- courier services.

***Store policy and procedures*** in regard to:

- store administration
- clerical systems
- operating and maintaining retail equipment.

***Equipment*** may include:

- fax machine
- telephone system
- photocopier
- answering machine or voicemail
- public address system
- paging system
- franking machine
- typewriters
- computers
- calculators
- adapted equipment for people with a disability, for example, talking calculators, computer hard and software, and TTY.

***Relevant personnel*** may include:

- supervisor
- team leader
- manager.

Systems used to record or ***file documents*** may be:

- manual
- electronic.

***Contact*** may be established by:

- telephone
- fax
- email
- letter
- face-to-face contact.

## Unit Sector(s)

Cross-Sector

## **Competency field**

Administration