



Australian Government

Department of Education, Employment and Workplace Relations

BSBRKG304A Maintain business records

Release: 1

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Modification History

Not applicable.

Unit Descriptor

This unit describes the work required to maintain the records of a business or records system in good order on a day-to-day basis. It includes the work to gather together records that are subject to business or records system updates, to perform those updates, and to retrieve reports from the system in response to a request.

Linkages outside these National Competency Standards

ISO DIS 15489 - Draft International Standard on Records Management

Links

The work described in this unit is linked to the work described in the following unit(s):

Previous Business Qualification(s)

Nil

The Same Business Qualification

BSBRKG303A Retrieve information from information

The following units represent a progression of the skills described in this unit:

BSBRKG301A Control records

BSBRKG302A Undertake disposal

Subsequent Business Qualification(s)

BSBRKG402A Provide information from and about records

BSBRKG403A Set up a business or records system for a small office

BSBRKG604A Define access rules and procedures

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Application of the Unit

Not applicable.

Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

Not applicable.

Elements and Performance Criteria Pre-Content

Not applicable.

Elements and Performance Criteria

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Element	Performance Criteria
1 Collate business records	1.1 Individual records which should be incorporated into the business or records system are identified according to organisational criteria 1.2 Information which should be recorded and incorporated into the business or records system is identified according to organisational criteria and recorded according to organisational procedures 1.3 Records are sorted in accordance with workplace requirements 1.4 Security and access requirements for records are adhered to in accordance with organisational procedures

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|---|---|-----|---|
| 2 | Update business or records system | 2.1 | Control information required for describing the new records for incorporation into the business or records system is identified and recorded in accordance with system procedures |
| | | 2.2 | Control information describing movement or use of records is updated within the business or records system in accordance with system procedures and workplace requirements |
| | | 2.3 | Control information in the business or records system is recorded and updated accurately and within the timeframes set by the organisational procedures |
| | | 2.4 | Records of completed business activities are identified and removed from the current system for disposal in accordance with system procedures and workplace requirements |
| 3 | Prepare reports from the business or records system | 3.1 | Request for reports is interpreted and clarification of content and frequency is sought where necessary |
| | | 3.2 | Reports are prepared from the business or records system in accordance with instructions or request |
| | | 3.3 | Format and style of reports are in accordance with organisational procedures |
| | | 3.4 | All reports from the business or records system are prepared within workplace requirements and according to security and access procedures |

Required Skills and Knowledge

Not applicable.

Evidence Guide

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

Critical Aspects of Evidence

Demonstrate ability to:

- comply with organisational procedures and workplace requirements
- provide accurate information in response to requests for records and reports
- present requested information in acceptable timeframe
- understand business or records system's numbering system and description conventions

Underpinning Knowledge*

* At this level the learner must demonstrate some relevant theoretical knowledge.

Relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination

Recordkeeping principles and processes including functional requirements for recordkeeping

Underpinning Skills

Good communication and interpretive skills

Ability to prioritise requests

Ability to interpret instructions and policies

Accurate data entry

Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

Consistency of Performance

In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations

Context/s of Assessment

Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement

Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package

Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment

Assessment should reinforce the integration of the key competencies and the business services common competencies for the particular AQF level. Refer to the Key Competency Levels at the end of this unit

Key Competency Levels

Collecting, analysing and organising information (Level 3) - in collating business records

Communicating ideas and information (Level 3) - in recording altered locations of business records in the business or records system

Planning and organising activities (Level 3) - in arranging records in preparation for work

Working with teams and others - (Level 3)

Using mathematical ideas and techniques (Level 2) - in working with the organisation's numbering / titling system

Solving problems - (Level 3)

Using technology (Level 2) - to find relevant information about the records

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies

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Range Statement

The Range Statement provides advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Records may be:

- an individual record (e.g., purchase orders, invoices or payment advices, timesheets, leave forms, job applications, electronic mail messages, items of correspondence)
- an entire group of records in any format, either paper-based or electronic

Technology used may be:

- proprietary recordkeeping package
- PC-based accounting systems, employee and tax records systems
- cash register-based systems
- paper-based accumulation and card systems

Business records may relate to:

- invoicing / sales
- expenditure
- human resource management
- taxation, asset management
- legislative / regulatory / licensing compliance
- stock control
- risk management
- customer relationship management

Business or records systems may be:

- financial (payroll or employee records; customer and sales records; project-based)
- or they may be a central records system, correspondence-based, covering all business conducted in the workplace

Workplace requirements may include:

- timeframe for processing
- disposal criteria identifying what items are kept and what are discarded
- numbering system or naming conventions for records
- arrangements for disposal of records
- occupational health&safety requirements

Security and access requirements may relate to individuals or the positions of individuals who may or may not be permitted to access certain records because of:

- security restrictions
- protection of privacy
- trade secrets or commercial in confidence information

Reports may be:

- system management reports
- ad-hoc reports

regular records management reports

part of a management solution for another support / operational function

Format and style of report may be formal or informal and may be:

computer-generated

hand-prepared

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expenditure

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Unit Sector(s)

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