



**Australian Government**

**Department of Education, Employment and Workplace Relations**

# **BSBINM201A Process and maintain workplace information**

**Revision Number: 1**

## BSBINM201A Process and maintain workplace information

### Modification History

Not applicable.

### Unit Descriptor

|                        |                                                                                                                                                                                                                                                                                                                                                         |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Unit descriptor</b> | <p>This unit describes the performance outcomes, skills and knowledge required to collect, process, store and maintain workplace information and systems. It also includes the maintenance of filing and records systems.</p> <p>No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.</p> |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### Application of the Unit

|                                |                                                                                                                                                                                                                                                                                                     |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Application of the unit</b> | <p>This unit applies to individuals who perform a range of routine tasks in the workplace, using a limited range of practical skills and fundamental knowledge of information and information systems in a defined context, under direct supervision or with limited individual responsibility.</p> |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

### Licensing/Regulatory Information

Not applicable.

### Pre-Requisites

|                           |  |  |
|---------------------------|--|--|
| <b>Prerequisite units</b> |  |  |
|                           |  |  |
|                           |  |  |

## Employability Skills Information

|                             |                                          |
|-----------------------------|------------------------------------------|
| <b>Employability skills</b> | This unit contains employability skills. |
|-----------------------------|------------------------------------------|

## Elements and Performance Criteria Pre-Content

|                                                                   |                                                                                                                                                                                                                                                                                                                  |
|-------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 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. |
|-------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## Elements and Performance Criteria

| ELEMENT                          | PERFORMANCE CRITERIA                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Collect information           | <ul style="list-style-type: none"><li>1.1. Collect <b>information</b> in a timely manner and ensure that it is relevant to organisational needs</li><li>1.2. Use <b>business equipment/technology</b> available in the work area to effectively obtain information</li><li>1.3. Apply <b>organisational requirements</b> relating to security and confidentiality in handling information</li></ul>                                                                                  |
| 2. Process workplace information | <ul style="list-style-type: none"><li>2.1. Use business equipment/technology to process information in accordance with organisational requirements</li><li>2.2. Process information in accordance with defined timeframes, guidelines and procedures</li><li>2.3. Update, modify and file information in accordance with organisational requirements</li><li>2.4. Collate and despatch information in accordance with specified timeframes and organisational requirements</li></ul> |
| 3. Maintain information systems  | <ul style="list-style-type: none"><li>3.1. Maintain information and filing systems in accordance with organisational requirements</li><li>3.2. Identify, <b>remove</b> and/or <b>relocate inactive or dead files</b> in accordance with organisational requirements</li><li>3.3. Establish and assemble new files in accordance with organisational requirements</li><li>3.4. Update reference and index systems in accordance with organisational requirements</li></ul>            |

## Required Skills and Knowledge

### REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit.

#### Required skills

- literacy skills to read and understand organisation's recordkeeping and information systems(including classification systems), to follow sequenced written instructions and to comprehend/interpret nature of record content
- numeracy skills to sequence and index files
- planning skills to organise work priorities and arrangements
- problem-solving skills to solve routine problems
- technology skills to select and use technology appropriate to maintaining workplace information.

#### Required knowledge

- key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:
  - anti-discrimination legislation
  - ethical principles
  - codes of practice
  - privacy laws
  - occupational health and safety
- organisational policies and procedures relating to collecting and processing workplace information
- organisational recordkeeping/filing systems and security procedures
- organisation's business and structure
- range of filing systems including paper-based and software-based.

## Evidence Guide

### EVIDENCE GUIDE

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

#### Overview of assessment

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

Evidence of the following is essential:

- applying organisational policies and procedures for collecting and processing workplace information
- accuracy in recording and documenting information
- correctly storing, classifying and maintaining documents and records.

#### Context of and specific resources for assessment

Assessment must ensure:

- access to an actual workplace or simulated environment
- access to office equipment and resources
- examples of workplace information systems.

#### Method of assessment

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

- direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate
- review of maintenance of information and filing systems
- analysis of responses to case studies and scenarios
- demonstration of techniques
- oral or written questioning to assess knowledge of the management of information in the workplace.

#### Guidance information for assessment

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

- general administration units
- other information management units.

## Range Statement

### 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, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

|                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b><i>Information</i></b> may include:                     | <ul style="list-style-type: none"> <li>• computer databases (library catalogue, customer records)</li> <li>• computer files (letters, memos and other documents)</li> <li>• correspondence (faxes, memos, letters, email)</li> <li>• forms (insurance forms, membership forms)</li> <li>• invoices (from suppliers, to debtors)</li> <li>• minutes of meetings</li> <li>• personnel records (personal details, salary rates)</li> <li>• sales records (monthly forecasts, targets achieved)</li> </ul> |
| <b><i>Business equipment/technology</i></b> may include:   | <ul style="list-style-type: none"> <li>• answering machine</li> <li>• binder</li> <li>• computer</li> <li>• fax machine</li> <li>• filing systems (manual/computerised/electronic)</li> <li>• photocopier</li> <li>• printer</li> <li>• telephone</li> </ul>                                                                                                                                                                                                                                           |
| <b><i>Organisational requirements</i></b> may include:     | <ul style="list-style-type: none"> <li>• despatching and collecting procedures</li> <li>• legal and organisational policies, guidelines and requirements</li> <li>• OHS policies, procedures and programs</li> <li>• procedures for deciding which records should be captured and filed</li> <li>• procedures for updating records</li> <li>• security procedures</li> </ul>                                                                                                                           |
| <b><i>Removing inactive or dead files</i></b> may include: | <ul style="list-style-type: none"> <li>• compressing computer files prior to archiving</li> <li>• periodically archiving or deleting files</li> <li>• transferring files at regular intervals or routinely checking for dead or inactive files</li> </ul>                                                                                                                                                                                                                                              |

| RANGE STATEMENT                                              |                                                                                                                                                                                           |
|--------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                              | <ul style="list-style-type: none"> <li>transferring records from the active filing system to secondary storage</li> </ul>                                                                 |
| <b><i>Relocating inactive or dead files</i></b> may include: | <ul style="list-style-type: none"> <li>electronic (email, internet access, diskette, tape, CD-ROM)</li> <li>microfilm</li> <li>photographic material</li> <li>printed material</li> </ul> |

## Unit Sector(s)

|             |  |
|-------------|--|
| Unit sector |  |
|-------------|--|

## Competency field

|                  |                                               |
|------------------|-----------------------------------------------|
| Competency field | Knowledge Management - Information Management |
|------------------|-----------------------------------------------|

## Co-requisite units

|                    |  |  |
|--------------------|--|--|
| Co-requisite units |  |  |
|                    |  |  |
|                    |  |  |