



Australian Government

Department of Education, Employment and Workplace Relations

CPPDSM3015B Use and maintain property and client information databases

Release: 1

CPPDSM3015B Use and maintain property and client information databases

Modification History

Not Applicable

Unit Descriptor

Unit descriptor

This unit of competency specifies the outcomes required to use safely and maintain accurately property and client information databases in the context of real estate agency operations. It includes accessing property and client information databases, retrieving property and client information and producing reports, gathering and entering property and client information, maintaining the secure storage of property and client information and contributing to the monitoring and improvement of agency information databases.

The unit may form part of the licensing requirements for persons engaged in real estate activities in those States and Territories where these are regulated activities.

Application of the Unit

Application of the unit

This unit of competency supports the work of licensed real estate agents, real estate representatives and support staff who use and maintain property and client information databases to support real estate agency operations.

Licensing/Regulatory Information

Refer to Unit Descriptor

Pre-Requisites

Prerequisite units Nil

Employability Skills Information

Employability skills The required outcomes described in this unit of competency contain applicable facets of employability skills. The Employability Skills Summary of the qualification in which this unit of competency is packaged, will assist in identifying employability skills requirements.

Elements and Performance Criteria Pre-Content

Elements describe the essential outcomes of a unit of competency.

Performance criteria describe the required performance needed to demonstrate achievement of the element. Where ***bold italicised*** text is used, further information is detailed in the required skills and knowledge and/or the range statement. Assessment of performance is to be consistent with the evidence guide.

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
1 Access appropriate databases.	1.1 Information requirements are determined. 1.2 Appropriate property or client database is identified and accessed in line with agency policy and procedures. 1.3 Property and client databases are administered in line with agency procedures, ethical standards, legislative requirements and privacy guidelines.
2 Retrieve relevant property and client information and produce reports.	2.1 Property or client database is interrogated using appropriate search techniques. 2.2 Database functions are used to access required property or client information. 2.3 Accessed property or client information is checked to ensure that it meets requirements. 2.4 Property or client information is downloaded and printed as required according to system procedures. 2.5 Property or client information is organised and presented in a format that conforms to requirements and agency style guide. 2.6 Reports are reviewed and checked for accuracy.
3 Enter property or client information.	3.1 Information is gathered, analysed and prepared for entry in property or client database in line with agency procedures, legislative requirements and privacy guidelines. 3.2 Information is checked for clarity, accuracy, currency and relevance in line with agency procedures, legislative requirements and privacy guidelines. 3.3 Information is accurately entered into property or client database in line with agency procedures, legislative requirements and privacy guidelines.
4 Maintain secure storage of information.	4.1 Database files are stored in a secure location according to agency procedures, legislative requirements and privacy guidelines. 4.2 Access to database files is restricted to authorised personnel in line with agency risk management policy and procedures, legislative requirements and privacy guidelines.
5 Contribute to monitoring and enhancing property information databases.	5.1 Requirements of property or client information databases are analysed and suggestions for improvements are provided to relevant personnel. 5.2 Feedback about the clarity, accuracy, currency and relevance of output from property or client

ELEMENT	PERFORMANCE CRITERIA
6 Use databases to enhance customer relations.	information databases is provided to relevant personnel.
	6.1 Regular clients are accurately identified and followed up according to agency practice.
	6.2 Client records are accurately used to advise clients on agency services of possible interest.

Required Skills and Knowledge

REQUIRED SKILLS AND KNOWLEDGE

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

Required skills:

- ability to communicate with and relate to a range of people from diverse social, economic and cultural backgrounds and with varying physical and mental abilities
- analytical skills to identify and interpret property information for use in the preparation of reports
- application of risk management strategies associated with the use and maintenance of property or client information databases
- computing skills to access and interrogate property or client information databases
- decision making and problem solving skills to analyse situations and make decisions regarding the selection of property or client information, the identification of appropriate information databases and the use and maintenance of database information
- literacy skills to access and interpret a variety of texts, including sales results; prepare reports; interpret graphical material such as maps, charts and graphs; and complete standard forms
- numeracy skills to calculate and interpret data, such as scales and distances on maps
- research skills to identify and locate documents and information relating to real estate operations using property and client information databases.

Required knowledge and understanding:

- agency procedures for property and client database management, including:
 - ethical standards regarding property and client information and databases
 - confidentiality regarding property and client information and databases
 - privacy
- procedures for using office computing equipment
- property and client information databases, including:

REQUIRED SKILLS AND KNOWLEDGE

- data entry and retrieval techniques
- file storage
- functions
- reports
- search techniques
- security
- types of databases relevant for property sales and management
- database information, including:
 - client information
 - demographic information
 - market information
 - site information
 - spatial information
 - tenant information
- database reports, including:
 - format
 - function
- relevant federal, and state or territory legislation and local government regulations relating to:
 - anti-discrimination and equal employment opportunity
 - consumer protection, fair trading and trade practices
 - employment and industrial relations
 - environment and sustainability
 - financial services
 - leases
 - OHS
 - privacy
 - property sales
 - property management
- risks and risk management strategies
- sources of property and client information, including:
 - local, state and commonwealth government documents and registers
 - publications and journals
 - computer data files
 - statutes
 - statistical summaries
 - policy statements
 - media reports.

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, the range statement and the Assessment Guidelines for this Training Package.

Overview of assessment

This unit of competency could be assessed through practical demonstration of accessing, using and maintaining information in a property or client database in an agency context. Targeted written (including alternative formats where necessary) or verbal questioning to assess the candidate's underpinning knowledge would provide additional supporting evidence of competence. The demonstration and questioning would include collecting evidence of the candidate's knowledge and application of ethical standards and relevant federal, and state or territory legislation and regulations. This assessment may be carried out in a simulated or workplace environment.

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

A person who demonstrates competency in this unit must be able to provide evidence of:

- contributing to the monitoring and enhancement of property and client information databases in an agency context
- gathering, analysing, preparing and inputting information into property and client information databases
- identifying and accessing appropriate property and client information databases to assist with specific tasks in line with agency and system procedures
- maintaining the secure storage of property and client database files
- producing different forms of reports using information retrieved from relevant property and client information databases
- retrieving relevant property information from property and client information databases to assist with specific tasks in line with agency and system procedures.

Context of and specific resources for assessment

Resource implications for assessment include:

- access to suitable simulated or real opportunities and resources to demonstrate competence
- assessment instruments that may include personal

planner and assessment record book

- access to a registered provider of assessment services.

Where applicable, physical resources should include equipment modified for people with disabilities.

Access must be provided to appropriate learning and/or assessment support when required.

Assessment processes and techniques must be culturally appropriate, and appropriate to the language and literacy capacity of the candidate and the work being performed.

Validity and sufficiency of evidence require that:

- competency will need to be demonstrated over a period of time reflecting the scope of the role and the practical requirements of the workplace
- where the assessment is part of a structured learning experience the evidence collected must relate to a number of performances assessed at different points in time and separated by further learning and practice with a decision of competence only taken at the point when the assessor has complete confidence in the person's competence
- all assessment that is part of a structured learning experience must include a combination of direct, indirect and supplementary evidence
- where assessment is for the purpose of recognition (RCC/RPL), the evidence provided will need to be current and show that it represents competency demonstrated over a period of time
- assessment can be through simulated project-based activity and must include evidence relating to each of the elements in this unit.

In all cases where practical assessment is used it will be combined with targeted questioning to assess the underpinning knowledge. Questioning will be undertaken in such a manner as is appropriate to the language and literacy levels of the candidate and any cultural issues that may affect responses to the questions, and will reflect the requirements of the competency and the work being performed.

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 in the performance criteria is detailed below. Add any 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.

- Information** may include:
- client information, including:
 - contact details
 - name
 - nature of enquiry or requirement
 - request for follow-up and promotional information
 - demographic information, including:
 - ethnicity
 - income
 - labour force
 - population age, density and size
 - population trends
 - market information, including:
 - construction costs
 - depreciation schedules
 - energy rating
 - housing prices
 - occupancy rates
 - operating costs
 - ownership of properties
 - rental and leasing rates
 - residential and business telephone, email and facsimile contact details
 - sales data
 - statutes
 - site information, including:
 - contaminated sites
 - flood-prone sites
 - heritage sites
 - information on affectations, such as easements and transmission lines

- main road developments
 - native title developments
 - spatial information, including:
 - aerial photographs
 - maps
 - plans
 - satellite imagery
 - statistics
 - tenant information.
- Clients** may include:
- buyer's agent
 - buyers
 - landlords
 - people from a range of social, cultural or ethnic backgrounds and with varying physical and mental abilities
 - property developer
 - regular and new customers
 - sellers
 - tenant's agent
 - tenants.
- Client database** may be:
- computer-based
 - manual.
- Agency policy and procedures** may include:
- access
 - authorisations
 - author instructions
 - backup
 - log-on procedures
 - password protection
 - privacy
 - security
 - standard formats
 - storage and location of data
 - use of templates.
- Ethical standards, legislative requirements and privacy guidelines** may include:
- authorised access
 - confidentiality
 - privacy.
- Search techniques** may include:
- Boolean operators
 - keywords
 - limiting by date or format
 - truncation

- Database functions** may include:
- use of different access points.
 - adding, deleting, moving and re-labelling fields
 - altering field widths
 - calculating and applying formulas
 - data protection
 - field definitions and attributes
 - formatting fields and text
 - headers and footers
 - inserting and deleting blank lines and spaces
 - repeating, if available
 - table, form and report wizards.
- Format** may include:
- alignment on page
 - columns
 - enhancements to format borders, patterns and colours
 - enhancements to text
 - headers and footers
 - tables
 - use of logos.
- Checking** may include:
- accuracy of data and formulas
 - ensuring instructions with regard to content and format have been followed
 - outcome of sorting and filtering
 - proofreading
 - spelling.
- Storage** may include:
- authorised access
 - filing locations
 - organisation policy for backing up files
 - organisation policy for filing hard copies of databases
 - privacy
 - security
 - storage in electronic folders and sub-folders
 - storage on hard or floppy disk drives, CD ROM and tape backup.
- Relevant personnel** may include:
- agency principal
 - database manager
 - licensed real estate agent
 - officer manager
 - support staff.

Unit Sector(s)

Unit sector Property development, sales and management

Competency field

Competency field Real estate