



Australian Government

FNSSUP505 Produce reports for superannuation

Release: 1

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Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 1.0.

Application

This unit describes the skills and knowledge required to analyse report requirements, design reports, research report content and produce reports for the purpose of administering superannuation services.

It applies to individuals who undertake research and use organisational skills to develop logically structured and accurate reports that meet organisational quality and compliance requirements.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Refer to the FNS Implementation Guide Companion Volume or the relevant regulator for specific guidance on requirements.

Unit Sector

Superannuation

Elements and Performance Criteria

ELEMENT	PERFORMANCE CRITERIA
<i>Elements describe the essential outcomes.</i>	<i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>
1. Analyse report requirements	1.1 Identify organisation and task requirements prior to document design and research 1.2 Identify key aspects of relevant statutory and regulatory requirements relating to reporting 1.3 Identify and access relevant resources and research requirements
2. Design report	2.1 Design report structure and layout to suit purpose, audience and information requirements of task 2.2 Design report to enhance readability and appearance that meets

ELEMENT	PERFORMANCE CRITERIA
	organisational and task requirements for style and layout 2.3 Use complex software functions to enable efficient manipulation of information and other material, and ensure consistency of design and layout
3. Research report content	3.1 Conduct research to gain information for report content, including development of financial and statistical details as required 3.2 Develop report content in accordance with organisational and compliance requirements 3.3 Gather evidence to support recommendations, confirm with relevant personnel and include conclusions in report
4. Produce report	4.1 Write report using appropriate language and information to meet report objectives 4.2 Ensure report is coherent and logical, and base any recommendations or suggestions on documented analysis or research undertaken 4.3 Ensure software operations used in development of documents achieve required results 4.4 Use production techniques that take ergonomic practices, environmental sustainability and energy efficiency into consideration 4.5 Edit documents and print in accordance with organisational and task requirements 4.6 Name and store documents in accordance with organisational requirements and exit application without information loss or damage 4.7 Prepare documents within designated timelines and organisational requirements for speed and accuracy

Foundation Skills

This section describes language, literacy, numeracy and employment skills incorporated in the performance criteria that are required for competent performance.

Skill	Performance Criteria	Description
Reading	1.1-1.3, 3.1, 3.3, 4.2,	Researches, analyses and consolidates information and

	4.5	data from a range of sources to determine content requirements
Writing	2.1, 3.2, 3.3, 4.1, 4.5	Structures, writes, edits and proofreads documents to ensure clarity of meaning, accuracy and consistency of information
Oral Communication	1.2, 3.3	Follows complex oral instructions and uses questioning to confirm requirements
Numeracy	3.1, 4.1, 4.2	Uses mathematical problem-solving techniques to check data and financial information, and to plan timelines and sequence work
Navigate the world of work	2.2, 3.2, 4.4-4.7	Takes full responsibility for following policies, procedures and legislative requirements
Get the work done	1.1-1.3, 2.1, 2.2, 2.3, 3.1, 3.2, 4.2-4.7	- Uses digital technologies and applications to manage and manipulate data and communicate effectively in a secure and stable digital environment - Accepts responsibility for planning and sequencing complex tasks and workload, negotiating key aspects with others and taking into account capabilities, efficiencies and effectiveness - Applies systematic and analytical decision-making processes for complex and non-routine situations

Unit Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
FNSSUP505 Produce reports for superannuation	FNSSUP505A Produce reports for superannuation	Updated to meet Standards for Training Packages. Minor edits to clarify intent of performance criteria.	Equivalent unit

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>

Assessment Requirements for FNSSUP505 Produce reports for superannuation

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Performance Evidence

Evidence of the ability to:

- analyse report requirements and design a report
- research report content requirements to produce a clear and accurate report
- use advanced functions of word processing and/or desktop publishing software applicable to superannuation reports
- apply ergonomic and sustainability principles in the workplace.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- describe the key aspects of legislation relevant to documentation within the superannuation industry
- outline the impact of formatting and design on the presentation and readability of documents
- describe the key features of organisational policy and procedures for written communications.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the superannuation field of work and include access to:

- common office equipment, technology, software and consumables
- organisational financial records
- organisational policy and procedures.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

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