



Australian Government

FNSSUP515 Produce reports for superannuation

Release: 1

FNSSUP515 Produce reports for superannuation

Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 5.0.

Application

This unit describes the skills and knowledge required to analyse report requirements, design reports, research report content and produce logically structured and accurate reports that meet organisational quality and compliance requirements for administering superannuation services.

The unit applies to those who use specialised industry knowledge and systematic approaches to thoroughly and accurately review and process and produce information and data in the superannuation industry.

Work functions in the occupational areas where this unit may be used are subject to regulatory requirements. Users are advised to check with the relevant state and territory regulatory authorities to confirm those 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 organisational and report objectives, purpose, audience and task requirements prior to document design and information gathering 1.2 Identify statutory and regulatory requirements relating to reporting 1.3 Identify and access relevant resources and research requirements
2. Design report	2.1 Model report structure and layout to suit purpose, audience and information requirements of task and confirm design meets organisational style and format

ELEMENT	PERFORMANCE CRITERIA
	2.2 Use software for report design and to manipulate information and other material 2.3 Ensure software operations used in document development achieve required results
3. Gather and develop content and evidence	3.1 Gather general, financial and statistical content required for report 3.2 Develop report content according to organisational and compliance requirements 3.3 Gather evidence that supports report recommendations 3.4 Communicate and confirm evidence to required stakeholders and include conclusions in report
4. Prepare and produce report	4.1 Prepare draft report 4.2 Seek advice from relevant stakeholders on draft report 4.3 Make required changes to report based on advice and finalise 4.4 Produce report using required technologies according to organisational and task requirements 4.5 Name and store report and supporting documents according to organisational policies and procedures

Foundation Skills

This section describes those language, literacy, numeracy and employment skills that are essential to performance but not explicit in the performance criteria.

SKILL	DESCRIPTION
Numeracy	Uses mathematical problem-solving techniques to check data and financial information, and to plan timelines and sequence work
Oral communication	Follows complex oral instructions and uses questioning to confirm requirements
Reading	Researches, analyses and consolidates information and data from a range of sources to determine content requirements
Writing	Structures, writes, edits and proofreads documents to ensure clarity of meaning, accuracy and consistency of information
Planning and organising	Accepts responsibility for planning and sequencing complex tasks and workload, negotiating key aspects with others and taking into account capabilities, efficiencies and effectiveness
Problem solving	Applies systematic and analytical decision-making processes for complex and non-routine situations
Self-management	Takes responsibility for following organisational policies and procedures and legislative requirements

SKILL	DESCRIPTION
Technology	• Uses digital technologies and applications to manage and manipulate data and communicate effectively in a secure and stable digital environment

Unit Mapping Information

Supersedes and is equivalent to FNSSUP505 Produce reports for superannuation.

Links

Companion Volume Implementation Guide is found on VETNet -

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

Assessment Requirements for FNSSUP515 Produce reports for superannuation

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Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- produce at least three different superannuation reports based on clear and accurate research findings according to organisational requirements.

In the course of the above, the candidate must:

- prepare documents within designated timeframe and organisational requirements.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- legislative requirements relating to documentation in the superannuation industry
- organisational policies and procedures relating to superannuation, including for:
 - formatting and designing reports
 - written communications
- research methods to obtain information on development of financial and statistical details as required
- advanced functions of word processing and desktop publishing software applicable to superannuation reports.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- organisational equipment, technology, software and consumables
- organisational financial records

- organisational policies and procedures.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

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