



Australian Government

Department of Education, Employment and Workplace Relations

FNSICORG302B Prepare reports for management

Release: 1

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Modification History

Not applicable.

Unit Descriptor

This unit describes the functions involved in preparing a range of reports for management.
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Application of the Unit

This unit requires the application of skills and knowledge required to produce reports to meet objectives of management requirements.

The unit encompasses developing reports to specifications, clarifying report objectives, assessing report data, analysing data, preparing the report and distributing the report to the relevant parties.

This unit has application across the entire financial services sector and can be utilised by any individual that is required to produce reports for management.

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Licensing/Regulatory Information

Not applicable.

Pre-Requisites

Not applicable.

Employability Skills Information

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

Elements and Performance Criteria Pre-Content

Elements define the essential outcomes of a unit of competency.

Performance Criteria describe the required performance needed to demonstrate achievement of the Element. **Bold, italicised** terms are elaborated in the Range Statement. Assessment of performance is to be consistent with the Evidence Guide.

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Elements and Performance Criteria

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Element	Performance Criteria
1 Develop report to specifications	1.1 Clarify report objectives 1.2 Plan the content and format of report 1.3 Produce outline of report against specifications
2 Access report data	2.1 Available data is examined for suitability for inclusion in report 2.2 Systems are examined to establish data limitations 2.3 Suitable data modelling tools to extract information are identified
3 Analyse data	3.1 Report data is analysed to ensure it meets company objectives and requirements 3.2 Data is produced in report format
4 Prepare reports	4.1 Reports are prepared in response to management objectives and in the required format 4.2 Report material is evaluated according to management objectives and revised as necessary 4.3 Report is forwarded to management for assessment and is revised as required
5 Distribute reports	5.1 Completed reports are distributed according to company requirements and timelines

Required Skills and Knowledge

REQUIRED KNOWLEDGE&SKILLS

Knowledge requirements include:

- company policy and procedures
- knowledge or awareness of relevant acts and regulations
- legal systems and procedures
- industry codes of practice
- computer systems

Skills requirements include:

- computerised spreadsheet and database
- data analysis and interpretation
- analytical skills
- interpersonal and communication
- report writing

Evidence Guide

EVIDENCE GUIDE

Assessment of performance requirements in the unit should be undertaken in an industry context. The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for the unit. Competency is demonstrated by performance of all stated criteria including the Range Statement applicable to the workplace.

Overview of assessment requirements

To achieve competency in this unit, a person must be able to demonstrate:

knowledge of organisational reporting format standards

ability to develop reports to specifications

ability to access report data

ability to analyse data

ability to prepare reports

ability to distribute reports to relevant parties

Critical aspects of evidence

Evidence required for demonstration of consistent performance:

Competence in this unit must be assessed over a period of time in order to ensure consistency of performance over the Range Statement and contexts applicable to the work environment.

Delivery/assessment relationship to other units:

This unit may be assessed on its own or it may be assessed with other units that cover related skills and knowledge.

Evidence is most relevant when provided through an integrated activity, which combines the elements of competency for the unit, or a cluster of units of competency.

Assessment requirements

Method of assessment:

For valid and reliable assessment of this unit, evidence should be gathered through a range of methods to indicate consistent performance.

Assessment of this unit of competence will usually include observation of processes and procedures, oral and/or written questioning on underpinning knowledge and skills and

other methods as required.

Context of assessment:

Assessment of performance requirements in this unit should be undertaken within the financial services industry context and should cover aspects of personal/financial responsibility and accountability.

Aspects of competency, including the attainment of relevant knowledge and skills, may be assessed in a relevant workplace, a closely simulated work environment, or other appropriate means that clearly meet industry competency requirements.

Resources required for assessment:

Unless otherwise specified, there are no significant resource implications for assessment of this unit, apart from access to a relevant workplace or closely simulated office environment and the use of a range of office equipment, technology and consumables. These may include standard commercial computer hardware, software, telephones, facsimiles, and other relevant office equipment.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that will affect performance.

The following variables 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. If **bold italicised** text is shown in Performance Criteria, details of the text are provided in the Range Statement.

Modelling tools may include:

interaction of financial data as it flows from the source to the required output

a process for testing assumptions against a variety of scenarios

Response may involve:

taking action in respect of management requests/ recommendations

Company requirements and timelines may include:

policy documentation

verbal instructions

written instructions

internal control guidelines

computer system documentation

Unit Sector(s)

Not applicable.

Relationship to other units

This unit replaces FNSICORG302A.

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