### Unit code
- **BSBINM201A**

### Unit title
- **Process and maintain workplace information**

### Unit descriptor
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.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

### Competency field
- Knowledge Management – Information Management

### Application of the unit
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.

### Employability skills
This unit contains employability skills.

### 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.

<table>
<thead>
<tr>
<th>Critical aspects for assessment and evidence required to demonstrate competency in this unit</th>
<th>Context of and specific resources for assessment</th>
<th>Method of assessment</th>
<th>Gather information for assessment</th>
</tr>
</thead>
</table>
| 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. | Assessment must ensure:  
- access to an actual workplace or simulated environment  
- access to office equipment and resources  
- examples of workplace information systems. | 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. | 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. |
<table>
<thead>
<tr>
<th>Required Skills and Knowledge</th>
<th>HSC Requirements and Advice</th>
<th>Key Terms and Concepts</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Required skills</strong></td>
<td><strong>Required knowledge</strong></td>
<td><strong>Key Terms and Concepts</strong></td>
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<tr>
<td>• 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</td>
<td>• key provisions of relevant legislation from all forms of government that may affect aspects of business operations, such as:</td>
<td>• x</td>
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<td>• numeracy skills to sequence and index files</td>
<td>- anti discrimination legislation</td>
<td>• x</td>
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<td>• planning skills to organise work priorities and arrangements</td>
<td>- ethical principles</td>
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<td>• problem solving skills to solve routine problems</td>
<td>- codes of practice</td>
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<td>• technology skills to select and use technology appropriate to maintaining workplace information.</td>
<td>- privacy laws</td>
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<td>- occupational health and safety</td>
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<td></td>
<td>• organisational policies and procedures relating to collecting and processing workplace information</td>
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<td></td>
<td>• organisational recordkeeping/filing systems and security procedures</td>
<td></td>
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<td></td>
<td>• organisation’s business and structure</td>
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<td>• range of filing systems including paper based and software based.</td>
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<tr>
<td>Element</td>
<td>Performance Criteria</td>
<td>Range Statement</td>
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<tr>
<td>1 Collect information</td>
<td>1.1 Collect <em>information</em> in a timely manner and ensure that it is relevant to organisational needs.</td>
<td>The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. <em>Bold italicised</em> 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. <em>Information</em> may include:</td>
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Information may include:
• computer databases (library catalogue, customer records)
• computer files (letters, memos and other documents)
• correspondence (faxes, memos, letters, email)
• forms (insurance forms, membership forms)
• invoices (from suppliers, to debtors)
• minutes of meetings
• personnel records (personal details, salary rates)
• sales records (monthly forecasts, targets achieved).
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</tr>
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</table>
| 1.2 Use **business equipment/technology** available in the work area to effectively obtain information. | **Business equipment/technology** may include:  
- answering machine  
- binder  
- computer | • delivery of information  
• tracking of information.  
Importance of accessing relevant and correct information in a business services workplace/organisation.  
Awareness of common types of workplace information including:  
• computer databases  
• computer files  
• messages  
• correspondence  
• forms  
• invoices  
• minutes of meetings  
• personnel/customer records  
• product information  
• promotional material.  
Awareness of sources of workplace information:  
• computers  
  - individual  
  - network  
• electronic archives and storage  
• paper filing systems  
  - drawers  
  - cabinets  
  - shelves  
• fax machines  
• telephones  
• answering machines and services.  
Workplace/organisation policies and procedures for:  
• responding to requests for information  
• obtaining information efficiently  
• processing information  
• forwarding information to the appropriate person. | Learning experiences for the HSC must address:  
A basic understanding of the function, operation and safe use of a range of commonly used business equipment/technology including: |
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| 1.3     | Apply organisational requirements relating to security and confidentiality in handling information. | Organisational requirements may include:  
- despatching and collecting procedures  
- legal and organisational policies, guidelines and requirements  
- OHS policies, procedures and programs  
- procedures for deciding which records should be captured and filed  
- procedures for updating records  
- security procedures. | Opportunities for students to access and use a range of business equipment/technology and interpret different types of records and their content. |

**Learning experiences for the HSC must address:**

A basic understanding of the principles covered by the following legislation:

- *Privacy Act 1988 (Cth)*
- *Privacy Amendment (Private Sector) Act 2000 (Cth)*
- *Freedom of Information Act 1982 (Cth).*

Awareness of workplace/organisation policy relating to information management including:

- acceptable use  
- internet and access to websites  
- confidentiality  
- privacy  
- security
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| 2 Process workplace information | 2.1 Use business equipment/technology to process information in accordance with organisational requirements. | Learning experiences for the HSC must address: An awareness of the benefits of good record-keeping including that it:  
- improves operational efficiency  
- supports accountability  
- contributes to corporate knowledge.  
A knowledge of workplace/organisation record-keeping practices and continuum including:  
- creation of records  
- maintenance of records  
- disposal of records. | - copyright  
- protection against computer viruses  
- software licensing. |
| | 2.2 Process information in accordance with defined timeframes, guidelines and procedures. | Learning experiences for the HSC must address: Workplace/organisation systems and protocols including:  
- authority  
- security/access  
- naming standards  
- version control  
- tracking processes. |  |
| | 2.3 Update, modify and file information in accordance with organisational requirements. | Learning experiences for the HSC must address: A basic knowledge of a range of methods of delivery including:  
- internal mail  
- placing in an in-tray/inbox  
- hand delivery  
- postal service  
- fax transmission  
- courier service  
- email. |  |
<p>| | 2.4 Collate and despatch information in accordance with specified timeframes and organisational requirements. |  |  |</p>
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</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Maintain information systems</td>
<td>3.1 Maintain information and filing systems in accordance with organisational requirements.</td>
<td>A range of opportunities for students to collect, process, collate and despatch workplace information to a nominated person within designated timeline.</td>
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| 3.2     | Identify, remove and/or relocate inactive or dead files in accordance with organisational requirements. | Removing inactive or dead files may include:  
- compressing computer files prior to archiving  
- periodically archiving or deleting files  
- transferring files at regular intervals or routinely checking for dead or inactive files  
- transferring records from the active filing system to secondary storage.  
Relocating inactive or dead files may include:  
- electronic (email, internet access, diskette, tape, CD ROM)  
- microfilm  
- photographic material  
- printed material. | A basic knowledge of various types of indexes found in a workplace/organisation filing system including:  
- card  
- paper  
- electronic  
- image-based.  
Storage of information including:  
- paper-based record  
  - filing cabinet  
  - flat storage  
  - lever arch file  
  - suspension folder  
  - shelving  
  - rotary storage  
- electronic record  
  - computer database  
  - computer file  
  - computer storage device  
  - email  
- image-based record  
  - micro-fiche  
  - micro-film  
  - CD/DVD. |
| 3.3     | Establish and assemble new files in accordance with organisational requirements. | Learning experiences for the HSC must address:  
A knowledge of when and how to remove and relocate inactive or dead files including:  
- compressing computer files prior to archiving  
- periodically archiving or deleting files  
- transferring files at regular intervals or routinely checking for dead or inactive files  
- transferring records from the active filing system to secondary storage  
- updating file index to show current status of record on file. |
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<td>3.4</td>
<td>Update reference and index systems in accordance with organisational requirements.</td>
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