

Training Package	Business Services (BSB01)	HSC Requirements and Advice
Title:	Process and maintain workplace information	
Unit Code	Unit Descriptor:	HSC Indicative Hours: 20
BSBCMN206A	This unit covers the skills and knowledge required to collect, process, store and maintain workplace information and its systems. It includes the maintenance of filing and record systems. This unit is related to BSBCMN305A Organise workplace information.	

Context/s of Assessment	Critical aspects of Evidence	Consistency of Performance	Resource Implications	HSC Requirements and Advice
<ul style="list-style-type: none"> - Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge and skills elaborated in the Evidence Guide, and within the scope as defined by the Range Statement - Assessment must take account of the endorsed assessment guidelines in the Business Services Training Package - Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment - Assessment should reinforce the integration of the key competencies and the Business Services Common Competencies for the particular AQF Level. Refer to the Key Competency Levels at the end of this unit 	<ul style="list-style-type: none"> - Application of organisational policies and procedures for collecting and processing workplace information - Maintains accuracy in recording and documenting information - Correct storage and classification of documents - Maintenance of information records 	<p>In order to achieve consistency of performance, evidence should be collected over a set period of time which is sufficient to include dealings with an appropriate range and variety of situations</p>	<p>The learner and trainer should have access to appropriate documentation and resources normally used in the workplace</p>	<p>Key Terms and Concepts:</p> <ul style="list-style-type: none"> - security of information - confidentiality - time frame - update - information modification - collate - dispatch - filing system - inactive or dead files - relocation - reference and index system - forecasts - targets - insurance - invoice - supplier - creditor - debtor - personnel - meeting minute - manual filing system - computerised filing system - electronic filing system - secondary storage - archive files - sales records

Element of Competency	Performance Criteria	Range Statement	Evidence Guide	HSC Requirements and Advice
1. Collect information	1.1 Collection of <i>information</i> is timely and relevant to organisational needs	<p>Legislation, codes and national standards relevant to the workplace which may include:</p> <ul style="list-style-type: none"> - award and enterprise agreements and relevant industrial instruments - relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination - relevant industry codes of practice <p>Information may include:</p> <ul style="list-style-type: none"> - correspondence (faxes, memos, letters, email) - computer databases (library catalogue, customer records) - computer files (letters, memos and other documents) - sales records (monthly forecasts, targets achieved) - forms (insurance forms, membership forms) - invoices (from suppliers, to debtors) - personnel records (personal details, salary rates) - minutes of meetings 	<p>• Knowledge-*</p> <p>* At this level the learner must demonstrate basic operational knowledge in a moderate range of areas.</p> <ul style="list-style-type: none"> - The relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination - Understanding of organisation's business and structure - Knowledge of the organisation's record keeping/filing systems and security procedures - Understanding organisational policies and procedures relating to collecting and processing workplace information <p>• Skills</p> <ul style="list-style-type: none"> - Literacy skills to read and understand organisation's record keeping and information (including classification) systems; follow sequenced written instructions; to comprehend/interpret nature of record content- - Interpreting and applying relevant access and security rules and conditions - Technology skills including the ability to select and use technology appropriate to a task - Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities 	<p>Learning experiences for the HSC must address:</p> <p>Types of information:</p> <ul style="list-style-type: none"> - correspondence (faxes, memos, letters, email) - computer databases (library catalogue, customer records) - computer files (letters, memos and other documents) - sales records (monthly forecasts, targets achieved) - forms (insurance forms, membership forms) - invoices (from suppliers, to debtors) - personnel records (personal details, salary rates) - minutes of meetings <p>Learning experiences for the HSC must address:</p> <p>Different types of office equipment operated in accordance with manufacturer's instructions</p> <p>Business equipment/technology includes:</p> <ul style="list-style-type: none"> - photocopier - computer - printer - binder - filing systems (manual/computerised/electronic) - answering machine - fax machine - telephone <p>Maintaining equipment in accordance with manufacturer's instructions</p> <p>Procedures for reporting faults</p>
	1.2 <i>Business equipment/technology</i> available in the work area is used to obtain information effectively	<p>Business equipment/technology may include:</p> <ul style="list-style-type: none"> - photocopier - computer - printer - binder - filing systems (manual/computerised/electronic), - answering machine - fax machine - telephone 		

Element of Competency	Performance Criteria	Range Statement	Evidence Guide	HSC Requirements and Advice
	1.3 <i>Organisational requirements</i> relating to security and confidentiality are applied to information handling			<p>Learning experiences for the HSC must address:</p> <p>Storing information</p> <ul style="list-style-type: none"> - on paper-based - electronically - as an image <p>Filing procedures according to industry or enterprise policy including:</p> <ul style="list-style-type: none"> - security / confidentiality - updating - retrieval and movement of files - inactive files
2. Process workplace information	2.1 Business equipment/technology is used to process information in accordance with <i>organisational requirements</i>		<ul style="list-style-type: none"> • Knowledge* <p>* At this level the learner must demonstrate basic operational knowledge in a moderate range of areas.</p> <ul style="list-style-type: none"> - Knowledge of the organisation's record keeping/filing systems and security procedures - Understanding organisational policies and procedures relating to collecting and processing workplace information <ul style="list-style-type: none"> • Skills <ul style="list-style-type: none"> - Literacy skills to read and understand organisation's record keeping and information (including classification) systems; follow sequenced written instructions; to comprehend/interpret nature of record content - Planning skills to organise work priorities and arrangements - Problem solving skills to solve routine problems - Technology skills including the ability to select and use technology appropriate to a task - Communication skills including reporting of information 	<p>Learning experiences for the HSC must address:</p> <p>Selecting appropriate equipment for the task to be undertaken</p> <p>Checking equipment availability for use by operator</p>
	2.2 Information is processed in accordance with defined timeframes, guidelines and procedures			<p>Learning experiences for the HSC must address:</p> <p>Locating specified files / records within designated timelines</p> <p>Following security and confidentiality procedures</p>
	2.3 <i>Information</i> is updated, modified and filed in accordance with organisational requirements	<p>Information may include:</p> <ul style="list-style-type: none"> - correspondence (faxes, memos, letters, email) - computer databases (library catalogue, customer records) - computer files (letters, memos and other documents) - sales records (monthly forecasts, targets achieved) - forms (insurance forms, membership forms), - invoices (from suppliers, to debtors) - personnel records (personal details, salary rates) - minutes of meetings 		<p>Learning experiences for the HSC must address:</p> <p>Maintaining system integrity through updating records</p>

Element of Competency	Performance Criteria	Range Statement	Evidence Guide	HSC Requirements and Advice
	2.4 Information is collated and dispatched in accordance with specified timeframes and organisational requirements		<ul style="list-style-type: none"> - Numeracy skills in relation to sequencing and indexing files - Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities 	<p>Learning experiences for the HSC must address:</p> <p>Locating and extracting files from the system and dispatching to the nominated person</p> <p>Following security and confidentiality procedures</p>
3. Maintain information systems	3.1 Information and filing systems are maintained in accordance with organisational requirements	<p>Organisational requirements may include:</p> <ul style="list-style-type: none"> - procedures for deciding which records should be captured and filed - security procedures - legal and organisation policy/guidelines and requirements - dispatching and collecting procedures - procedures for updating records - Occupational Health and Safety policies, procedures and programs 	<ul style="list-style-type: none"> • Knowledge* * At this level the learner must demonstrate basic operational knowledge in a moderate range of areas. - Knowledge of the organisation's record keeping/filing systems and security procedures- - Understanding organisational policies and procedures relating to collecting and processing workplace information. • Skills - Problem solving skills to solve routine problems - Technology skills including the ability to select and use technology appropriate to a task - Communication skills including reporting of information - Numeracy skills in relation to sequencing and indexing files - Ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities 	<p>Learning experiences for the HSC must address:</p> <p>Forms of paper based storage:</p> <ul style="list-style-type: none"> - filing cabinets - flat - lever arch - suspension folders - shelving <p>Forms of electronic storage:</p> <ul style="list-style-type: none"> - database - computer files - email <p>Forms of image based storage:</p> <ul style="list-style-type: none"> - micro-fiche - micro-film <p>Centralised and non-centralised filing systems</p> <p>Various filing classifications including:</p> <ul style="list-style-type: none"> - alphabetical - numerical - key word - geographical - chronological - subject

Element of Competency	Performance Criteria	Range Statement	Evidence Guide	HSC Requirements and Advice
	3.2 <i>Inactive or dead files</i> are identified, <i>removed</i> and/or <i>relocated</i> in accordance with organisational requirements	Removing inactive or dead files may include: <ul style="list-style-type: none"> - transferring records from the active filing system to secondary storage - transferring files at regular intervals or routinely checking for dead or inactive files - periodically archive or delete files - compressing computer files prior to archiving Relocation of information may include: <ul style="list-style-type: none"> - electronic (email, internet access, diskette, tape, CD-ROM) - microfilm - printed material - photographic material 		Learning experiences for the HSC must address: Identifying, recording and storing dead / inactive files Removing and archiving dead / inactive files Updating file index to show current status of record on file
	3.3 New files are established and assembled in accordance with organisational requirements			Learning experiences for the HSC must address: Gathering and entering individual items into the filing system Recording and indexing new files
	3.4 Reference and index systems are updated in accordance with organisational requirements			Learning experiences for the HSC must address: The need for records to be updated and accurate to maintain the integrity of the system

Key Competency Levels

NB: These levels do not relate to the Australian Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Collect, analyse and organise information	Communicate ideas and information	Plan and organise activities	Work with others and in teams	Use mathematical ideas and techniques	Solve problems	Use technology
Level 2	Level 1	Level 1	Level 1	Level 1	Level 1	Level 2

Three levels of performance denote level of competency required to perform task.

1. Perform 2. Administer 3. Design

- **Collecting, analysing and organising information** – to store and dispatch information
- **Communicating ideas and information** – with members of the work team
- **Planning and organising activities** – for collating and filing
- **Working with teams and others** – in completing scheduled tasks
- **Using mathematical ideas and techniques** – in filing information
- **Solving problems** – to store and dispatch information
- **Using technology** – to complete allocated tasks

Please refer to the Assessment Guidelines for advice on how to use the Key Competencies