

Training Package	Tourism, Hospitality and Events (SIT07)		HSC Requirements and Advice
Unit title	Perform office procedures		
Unit code	Competency field	Sector	HSC Indicative Hours
SITXADM001A	Administration	Cross-sector	15

Unit descriptor	<p>This unit describes the performance outcomes, skills and knowledge required to complete a range of routine office procedures and activities, including writing simple correspondence.</p> <p>No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.</p> <p>It does not cover specific financial skills which are found in other units such as SITXFIN001A Process financial transactions. Development of more complex documents and correspondence is covered in SITXADM003A Write business documents.</p>
Prerequisite units	Nil
Application of the unit	<p>This unit describes a fundamental administrative function for the tourism and hospitality industries and applies to the full range of industry sectors and environments. All manner of personnel are required to perform office procedures. For some it may be a key aspect of their job (e.g. for those working in an office environment) and for others an occasional task (e.g. for those working in a stock control environment or kitchen).</p> <p>All personnel at all levels would apply this skill, but it does describe a basic operational function of minimal complexity.</p>
Employability skills	The required outcomes described in this unit of competency contain applicable facets of employability skills. The <i>Employability Skills Summary</i> of the qualification in which this unit of competency is packaged, will assist in identifying employability skill requirements.

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 this Training Package.

Critical aspects for assessment and evidence required to demonstrate competency in this unit	Context of and specific resources for assessment	Methods of assessment	Assessing employability skills
<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> ability to draft multiple pieces of clear, concise and correct written communication, with different purposes, appropriate to the audience and situation ability to process a range of office documentation accurately and undertake a range of office tasks using different 	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> demonstration of skills within a fully equipped office environment using appropriate computers, printers and other office equipment such as facsimile machines, photocopiers and software programs currently used in the tourism and hospitality industries to assist with administrative functions. 	<p>A range of assessment methods should be used to assess the practical skills and knowledge required to perform office procedures. The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> review of documents processed or produced by the candidate project to develop a portfolio of 	<p>Employability skills are integral to effective performance in the workplace and are broadly consistent across industry sectors. How these skills are applied varies between occupations and qualifications due to the different work functions and contexts.</p> <p>Employability skills embedded in this unit should be assessed holistically with other</p>

Critical aspects for assessment and evidence required to demonstrate competency in this unit cont/d		Methods of assessment cont/d	Assessing employability skills cont/d
<p>equipment ideally across a complete shift or operating period to address a range of office tasks</p> <ul style="list-style-type: none"> • completion of office administrative activities within typical workplace time constraints. 		<p>documentation or correspondence associated with a particular job, event or project</p> <ul style="list-style-type: none"> • questions to evaluate selection of appropriate type and format of correspondence for particular audiences, purposes and situations • observation of candidate's safe and correct usage of office equipment • review of portfolios of evidence and third party workplace reports of on the job performance by the candidate. <p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:</p> <ul style="list-style-type: none"> • SITXCOM004A Communicate on the telephone • BSBCMN205B Use business technology. 	<p>relevant units that make up the skill set or qualification and in the context of the job role.</p>

Required Skills and Knowledge		HSC Requirements and Advice
This section describes the essential skills and knowledge and their level, required for this unit.		
<p>The following skills must be assessed as part of this unit:</p> <ul style="list-style-type: none"> • communication skills to convey meaning clearly and concisely • basic literacy and written communication skills to produce workplace documentation and correspondence • basic numeracy skills to do simple clerical tasks and count. 	<p>The following knowledge must be assessed as part of this unit:</p> <ul style="list-style-type: none"> • organisation practices and procedures for preparing and processing documents • layout, format and features of typical business documents and alternative formats for special needs groups, such as large print • features and usage of typical office equipment • safe work practices for using office equipment and any related chemicals. 	
		<p>Key Terms and Concepts</p> <ul style="list-style-type: none"> • correspondence • office documents • office equipment • office procedures • processing documents.

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
1 Process office documents.	1.1 Process <i>office documents</i> according to organisation procedures and within designated timelines.	<p>The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. <i>Bold italicised</i> wording in the performance criteria is detailed below.</p> <p><i>Office documents to be processed</i> may include:</p> <ul style="list-style-type: none"> • guest mail • customer records • incoming and outgoing correspondence • files • letters • facsimiles • memos • reports • menus • banquet orders • financial records • invoices • receipts. 	<p>Learning experiences for the HSC must address:</p> <p>Knowledge of the layout, features and purpose of a range of office documentation commonly used in the tourism industry including:</p> <ul style="list-style-type: none"> • correspondence (faxes, memos, letters and email) <ul style="list-style-type: none"> - incoming - outgoing • mail • files • customer records (database and other reports) • booking system records • financial records • forms <ul style="list-style-type: none"> - manual - electronic • invoices and receipts. <p>An understanding of procedures for processing workplace documents including:</p> <ul style="list-style-type: none"> • issuing and recording receipt • photocopying if required • selecting media if a reply is required, including fax, email or letter • presenting documents including collating and binding if required • mailing • filing <ul style="list-style-type: none"> - manual - electronic. <p>An awareness of the different types of mail including:</p> <ul style="list-style-type: none"> • general • confidential • personal • urgent • damaged • suspicious • unsolicited • email. <p>An awareness of procedures for processing incoming and outgoing mail.</p>

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			<p>An awareness of the importance of maintaining privacy and security when processing mail.</p> <p>An understanding of mail preparation procedures including:</p> <ul style="list-style-type: none"> • address detail and layout of letter and envelope • letter has been signed • enclosures complete and included • return address. <p>Procedures for processing outgoing mail including:</p> <ul style="list-style-type: none"> • receive • check • sort • prioritise • register and dispatch. <p>An awareness of the types of services available for outgoing mail including:</p> <ul style="list-style-type: none"> • overnight • express • person-to-person • courier • bulk • special security • certified • international/domestic. <p>Procedures for calculating postage costs.</p> <p>Awareness of procedures for dealing with courier services including:</p> <ul style="list-style-type: none"> • incoming • outgoing. <p>An awareness of workplace/organisation practices for recording, storing and exchanging written information quickly and efficiently.</p>
	<p>1.2 Use <i>office equipment</i> safely and correctly to <i>process documents</i>.</p>	<p>Office equipment may include:</p> <ul style="list-style-type: none"> • photocopiers • facsimiles • computers 	<p>Learning experiences for the HSC must address:</p> <p>An understanding of the function, operation and safe use of commonly used office equipment and consumables including:</p>

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		<ul style="list-style-type: none"> • paging equipment • calculators • audio transcribing machines • telephone answering machines. <p><i>Processing of documents</i> may include:</p> <ul style="list-style-type: none"> • recording sent or received documents • filing, including electronic filing • mailing, including bulk mailing • photocopying • faxing • emailing • collating • binding. 	<ul style="list-style-type: none"> • photocopier • fax machine • computer • printer • scanner • calculator • telephone • answering machines • software programs. <p>Selection and use of various office equipment appropriate for the task to be undertaken.</p> <p>Knowledge of safe work practices and procedures including:</p> <ul style="list-style-type: none"> • selection of appropriate equipment for task • correct use, maintenance and storage of equipment • correct handling, application, labelling and storage of hazardous and non-hazardous materials.
	1.3 Identify, rectify or report office equipment malfunctions promptly and according to organisation procedures.		<p>Learning experiences for the HSC must address:</p> <p>An awareness of the importance of and procedures for maintaining equipment in accordance with manufacturer's instructions and occupational health and safety (OHS) requirements.</p> <p>An awareness of the procedures for reporting faults.</p> <p>Personnel to whom problems should be reported:</p> <ul style="list-style-type: none"> • supervisor/manager • supplier/manufacturer.
2 Draft written communication.	2.1 Select appropriate format and style for <i>correspondence</i> according to purpose, audience and situation.	<p><i>Correspondence</i> to be drafted <u>must</u> include a selection from each of the following:</p> <ul style="list-style-type: none"> • letters • emails • faxes • memos. 	<p>Learning experiences for the HSC must address:</p> <p>Knowledge of forms of correspondence including:</p> <ul style="list-style-type: none"> • acknowledgement • confirmation • enquiry • covering letter • itinerary. <p>Written communication media including:</p> <ul style="list-style-type: none"> • paper-based • electronic.

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			<p>An awareness of a range of alternative formats for correspondence appropriate for individuals with special needs.</p> <p>The following skills in written communications:</p> <ul style="list-style-type: none"> • spelling • grammar • punctuation • proofreading. <p>An awareness of workplace/organisation:</p> <ul style="list-style-type: none"> • style guides for written correspondence • standard turnaround times.
	2.2 Draft documents according to organisation formats and protocols.		
	2.3 Use clear and concise language appropriate to purpose, audience and situation.		<p>Learning experiences for the HSC must address:</p> <p>Preparation of correspondence in a style that is:</p> <ul style="list-style-type: none"> • clear • legible • concise • accurate • courteous • complete • culturally sensitive • appropriate in terms of <ul style="list-style-type: none"> - industry terminology - formality and language.
	2.4 Use correct spelling, punctuation and grammar to ensure understanding by receiver.		<p>Learning experiences for the HSC must address:</p> <p>A knowledge of editing and proofreading skills including:</p> <ul style="list-style-type: none"> • sources for checking spelling and grammar • using electronic spelling and grammar tools.
	2.5 Check information for accuracy prior to sending.		<p>Learning experiences for the HSC must address:</p> <p>Procedures for checking, correcting, signing and dispatching written information.</p>

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			An awareness of appropriate style and format for written correspondence.
3 Maintain document systems.	<p>3.1 File or store documents according to organisation security procedures.</p> <p>3.2 Modify and update reference and index systems according to organisation procedures.</p>		<p>Learning experiences for the HSC must address:</p> <p>Awareness of workplace/organisation policy relating to document systems including:</p> <ul style="list-style-type: none"> • acceptable use • confidentiality • privacy • security. <p>Knowledge of processes and procedures for the storage and security of documents including:</p> <ul style="list-style-type: none"> • creation and indexing of new files • backups • retrieval and movement of files • updating files • location of filing systems (centralised and non-centralised) • authorised access to hard copy/electronic files • enterprise privacy policy • confidentiality. <p>An understanding of the need for records to be updated and accurate to maintain the integrity of the system.</p> <p>Difference between:</p> <ul style="list-style-type: none"> • paper-based and electronic file and folder • centralised and decentralised filing system • fixed and portable storage • inactive and dead file. <p>An awareness of factors affecting how workplace information is stored including:</p> <ul style="list-style-type: none"> • the amount of information to be stored • the size of the workplace/organisation • how work is conducted • the amount of storage space available • how often records need to be accessed • security required • cost of storage equipment • protection from environmental effects.

Element	Performance Criteria	Range Statement	HSC Requirements and Advice
			<p>Knowledge of filing procedures/processes according to industry or workplace/organisation standards including:</p> <ul style="list-style-type: none"> • classifying • sorting • storing. <p>A knowledge of classification systems including:</p> <ul style="list-style-type: none"> • alphabetical • numerical • key word • geographical • chronological • subject. <p>An awareness of various types of storage systems including:</p> <ul style="list-style-type: none"> • paper-based record <ul style="list-style-type: none"> - filing cabinet - flat storage - lever arch file - suspension folder - shelving • electronic record <ul style="list-style-type: none"> - computer database - computer <ul style="list-style-type: none"> ▪ file ▪ storage device • email folder.