

<b>Training Package</b>	<b>Hospitality (THH02)</b>	<b>HSC Requirements and Advice</b>
<b>Title:</b>	<b>Perform office procedures</b>	
<b>Unit Code</b>	<b>Unit Descriptor:</b>	<b>HSC Indicative Hours:</b>
<b>THHGGA02B</b>	This unit deals with the skills and knowledge required to complete a range of routine office procedures and activities including writing simple correspondence. It does not cover specific financial skills which are found in other units such as THHGFA01B Process financial transactions.	<b>15</b>

<b>Essential Knowledge and Skills to be Assessed</b>	<b>Critical Aspects of Assessment</b>	<b>Context of Assessment and Resource Implications</b>	<b>Assessment Methods</b>	<b>HSC Requirements and Advice</b>
<p>The following skills and knowledge must be assessed as part of this unit:</p> <ul style="list-style-type: none"> <li>enterprise practices and procedures for processing documents</li> <li>layout, format and features of typical business documents</li> <li>features and usage of typical office equipment</li> <li>safe work practices for using office equipment and chemicals</li> <li>communication skills to convey meaning clearly and concisely</li> <li>basic literacy and written communication skills in relation to workplace documentation and to produce correspondence</li> <li>basic numeracy in order to count and do simple clerical tasks.</li> </ul>	<p>Evidence of the following is critical:</p> <ul style="list-style-type: none"> <li>ability to accurately process a range of office documentation within enterprise acceptable timeframes</li> <li>ability to draft a piece of clear, concise and correct written communication, appropriate to the purpose, audience and situation and free from errors.</li> </ul>	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> <li>demonstration of office skills within a fully-equipped office environment and using industry-current equipment</li> <li>demonstration of skills across a complete shift or operating period to address an adequate range of office tasks</li> <li>performance of office procedures within typical workplace time constraints.</li> </ul> <p><b>Linkages with Other Units</b></p> <p>This unit underpins performance in a range of other office-based units. It is recommended that it be delivered together with other relevant units.</p> <p>This unit has particular linkages to the following units and combined training and assessment is strongly recommended:</p> <ul style="list-style-type: none"> <li>THHGGA01B Communicate on the telephone</li> <li>BSBCM205A Use business technology</li> </ul>	<p>Assessment methods must be chosen to ensure that the performing of clerical procedures can be practically demonstrated. Methods must include assessment of knowledge as well as assessment of practical skills.</p> <p>The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> <li>review of documents processed or produced by the candidate</li> <li>project to develop a portfolio of documentation and/or correspondence associated with a particular job, event or project</li> <li>questions to evaluate selection of appropriate type and format of correspondence for particular audiences, purposes and situations</li> <li>observation of candidate's safe and correct usage of office equipment</li> <li>review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate.</li> </ul>	<p><b>Key Terms and concepts</b></p> <ul style="list-style-type: none"> <li>audience</li> <li>business documents</li> <li>confidentiality</li> <li>correspondence</li> <li>editing</li> <li>filing systems</li> <li>incoming mail</li> <li>layout</li> <li>literacy skills</li> <li>numeracy skills</li> <li>office equipment</li> <li>outgoing mail</li> <li>privacy</li> <li>proofreading</li> <li>protocol</li> <li>written communication</li> </ul>

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<p><b>1 Process office documents</b></p>	<p>1.1 Process documents accurately, in accordance with enterprise procedures and within designated timelines.</p>	<p>This unit applies to all hospitality and tourism operations. The following explanations identify how this unit may be applied in different workplaces, sectors and circumstances.</p> <p>For generic pre-employment training and assessment, a range of industry contexts must be addressed. Where the focus is sector or workplace specific, training and assessment must be tailored to meet particular needs.</p> <p>Processing of documents may include:</p> <ul style="list-style-type: none"> <li>• recording receipt or sending of documents</li> <li>• filing (including electronic filing)</li> <li>• mailing (including bulk mailing)</li> <li>• photocopying</li> <li>• faxing</li> <li>• e-mailing</li> <li>• collating</li> <li>• binding.</li> </ul> <p>Office documents to be processed may include:</p> <ul style="list-style-type: none"> <li>• guest mail</li> <li>• customer records</li> <li>• incoming and outgoing correspondence</li> <li>• files</li> <li>• letters</li> <li>• facsimiles</li> <li>• memos</li> <li>• reports</li> <li>• menus</li> <li>• banquet orders</li> <li>• financial records</li> <li>• invoices</li> <li>• receipts.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>Layout and features of business documents including:</p> <ul style="list-style-type: none"> <li>• correspondence (faxes, memos, letters and email)</li> <li>• database reports (customer records)</li> <li>• booking system records</li> <li>• sales records (forecasts and actuals)</li> <li>• forms (manual and electronic)</li> <li>• invoices (from suppliers and to debtors).</li> </ul> <p>Procedure to follow to process documents including:</p> <ul style="list-style-type: none"> <li>• recording receipt</li> <li>• photocopying if required</li> <li>• selecting media if a reply is required, including fax, email or letter</li> <li>• presentation of documents including collating and binding if required</li> <li>• mailing</li> <li>• filing.</li> </ul> <p>An understanding of the different types of mail:</p> <ul style="list-style-type: none"> <li>• general</li> <li>• confidential</li> <li>• damaged</li> <li>• suspicious</li> <li>• urgent</li> <li>• personal</li> <li>• unsolicited</li> <li>• email.</li> </ul> <p>Procedures for incoming mail including:</p> <ul style="list-style-type: none"> <li>• check</li> <li>• sort</li> <li>• prioritise</li> <li>• register</li> <li>• distribute.</li> </ul> <p>An understanding of the mail preparation procedures including:</p> <ul style="list-style-type: none"> <li>• address detail and layout of letter and envelope</li> <li>• letter has been signed</li> <li>• enclosures complete and included</li> <li>• return address.</li> </ul> <p>Procedures for outgoing mail including:</p> <ul style="list-style-type: none"> <li>• receive</li> <li>• check</li> <li>• sort</li> <li>• prioritise</li> </ul>

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			<ul style="list-style-type: none"> <li>• calculate and pay postage</li> <li>• register and dispatch.</li> </ul> <p>Types of services available for outgoing mail including:</p> <ul style="list-style-type: none"> <li>• overnight</li> <li>• express</li> <li>• person-to-person</li> <li>• bulk</li> <li>• special security</li> <li>• certified.</li> </ul>
	1.2 Use office equipment correctly to process documents.	Office equipment may include: <ul style="list-style-type: none"> <li>• photocopier</li> <li>• facsimile</li> <li>• computer</li> <li>• paging equipment</li> <li>• calculator</li> <li>• audio-transcribing machine</li> <li>• telephone answering machines.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>Selecting appropriate equipment for the task to be undertaken.</p> <p>Checking equipment availability for use by operator.</p> <p>Operating office equipment in accordance with manufacturer's instructions including:</p> <ul style="list-style-type: none"> <li>• photocopier</li> <li>• facsimile machine</li> <li>• computer</li> <li>• printer</li> <li>• calculator</li> <li>• telephone</li> <li>• answering machines.</li> </ul>
	1.3 Identify, rectify or report office equipment malfunctions promptly, and in accordance with enterprise procedures.		<p><b>Learning experiences for the HSC must address:</b></p> <p>Maintaining equipment in accordance with manufacturer's instructions.</p> <p>Procedures for reporting faults.</p>
2 <b>Draft written communication</b>	2.1 Select appropriate format and style for correspondence according to purpose, audience and situation.	Correspondence to be drafted must include a selection from each of the following: <ul style="list-style-type: none"> <li>• letters</li> <li>• e-mails</li> <li>• faxes</li> <li>• memos.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>The importance of the following skills in written communications:</p> <ul style="list-style-type: none"> <li>• listening</li> <li>• spelling</li> <li>• grammar</li> <li>• punctuation</li> <li>• proofreading.</li> </ul>

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			<p>Written correspondence including:</p> <ul style="list-style-type: none"> <li>• handwritten and word-processed letters</li> <li>• form letters</li> <li>• electronic mail</li> <li>• internal memos</li> <li>• briefing notes</li> <li>• facsimiles</li> <li>• receipts</li> <li>• customer records</li> <li>• general correspondence.</li> </ul>
	<p>2.2 Draft documents according to enterprise formats and protocols.</p>		<p><b>Learning experiences for the HSC must address:</b></p> <p>Enterprise practices of recording, storing and exchanging written messages quickly and efficiently.</p> <p>Forms of correspondence including:</p> <ul style="list-style-type: none"> <li>• acknowledgement</li> <li>• confirmation</li> <li>• enquiry</li> <li>• covering letter.</li> </ul>
	<p>2.3 Use clear and concise language appropriate to purpose, audience and situation.</p>		<p><b>Learning experiences for the HSC must address:</b></p> <p>Preparation of correspondence in a style that is:</p> <ul style="list-style-type: none"> <li>• clear</li> <li>• concise</li> <li>• correct</li> <li>• courteous</li> <li>• complete</li> <li>• targeted to audience.</li> </ul>
	<p>2.4 Use correct spelling, punctuation and grammar to ensure understanding by receiver.</p>		<p><b>Learning experiences for the HSC must address:</b></p> <p>Editing and proofreading skills:</p> <ul style="list-style-type: none"> <li>• sources for checking spelling and grammar</li> <li>• using electronic spelling and grammar tools.</li> </ul>
	<p>2.5 Check information for accuracy prior to sending.</p>		<p><b>Learning experiences for the HSC must address:</b></p> <p>Procedures for checking, correcting, signing and dispatching written information.</p> <p>Written correspondence examined for style and format.</p>

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<b>3 Maintain document systems</b>	3.1 File/store documents in accordance with enterprise security procedures.	Office documents to be processed may include: <ul style="list-style-type: none"> <li>• guest mail</li> <li>• customer records</li> <li>• incoming and outgoing correspondence</li> <li>• files</li> <li>• letters</li> <li>• facsimiles</li> <li>• memos</li> <li>• reports</li> <li>• menus</li> <li>• banquet orders</li> <li>• financial records</li> <li>• invoices</li> <li>• receipts.</li> </ul>	<p><b>Learning experiences for the HSC must address:</b></p> <p>Storage and security of documents including:</p> <ul style="list-style-type: none"> <li>• creation and indexing of new files</li> <li>• backups</li> <li>• retrieval and movement of files</li> <li>• updating files</li> <li>• location of filing systems (centralised and non-centralised)</li> <li>• authorised access to hard copy/electronic files</li> <li>• enterprise privacy policy</li> <li>• confidentiality.</li> </ul> <p>Knowledge of electronic storage systems:</p> <ul style="list-style-type: none"> <li>• database</li> <li>• spreadsheets</li> <li>• network files.</li> </ul> <p>Knowledge of paper-based storage systems:</p> <ul style="list-style-type: none"> <li>• filing cabinets</li> <li>• flat files</li> <li>• lever arch files</li> <li>• brochure stands</li> <li>• suspension files.</li> </ul> <p>Knowledge of image-based storage systems:</p> <ul style="list-style-type: none"> <li>• microfiche</li> <li>• microfilm</li> <li>• image database.</li> </ul> <p>Filing classifications including:</p> <ul style="list-style-type: none"> <li>• alphabetical</li> <li>• numerical</li> <li>• geographical</li> <li>• chronological</li> <li>• subject</li> <li>• key word.</li> </ul>
	3.2 Modified and update reference and index systems in accordance with enterprise procedures.		<p><b>Learning experiences for the HSC must address:</b></p> <p>Locating and extracting specified files from the system and dispatching to the nominated person within designated timelines.</p> <p>Maintaining system integrity through updating records.</p> <p>Following security and confidentiality procedures.</p>

## Key Competencies in this Unit

Key Competencies are an integral part of all workplace competencies. The table below describes those applicable to this unit. Trainers and assessors should ensure that they are addressed in training and assessment.  
 Level 1 = Perform    Level 2 = Administer and Manage    Level 3 = Design and Evaluate

Key Competencies	Level	Examples
Collecting, Organising and Analysing Information	1	Collating and filing documents Researching simple information in order to complete tasks Organising information so that it is easily accessible
Communicating Ideas and Information	2	Drafting correspondence for different purposes and situations Adapting communication style to suit different needs Writing and responding to customers' correspondence
Planning and Organising Activities	1	Organising and prioritising daily work Planning details of correspondence to be written
Working with Others and in Teams	1	Working with colleagues in same and other departments or sections Communicating with customers, colleagues
Using Mathematical Ideas and Techniques	1	May involve some simple tasks such as counting or calculating quantities of documents, reading financial information and documents
Solving Problems	1	Dealing with difficult customers, technical problems associated with using equipment
Using Technology	1	Using communications equipment such as photocopiers, computers and fax machines