



## Occupational Standards for Caribbean Vocational Qualifications (CVQ)

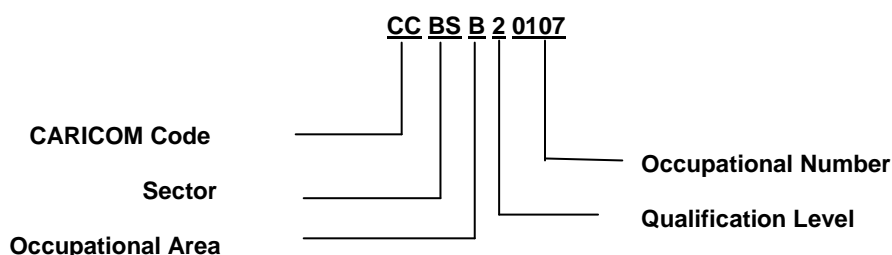
### CCBSB20107 Level 2 Business Administration (Secretarial Skills)

Unit Number	Unit Title	Requirement
BSBBAD0032B	Use reminder systems	Mandatory
BSBBAD0212B	Process mail	Mandatory
BSBCOR0252B	Exercise initiative in a business environment	Mandatory
BSBBAD0302B	Produce business documents	Mandatory
BSBBAD0322 B	Organize business travel	Mandatory
BSBBAD0332B	Prepare and process financial/business documents	Mandatory
BSBBAD0412B	Promote products & services	Mandatory
BSBBAD0622B	Produce text from audio	Mandatory
BSBBAD0352B	Organize meetings	Mandatory
BSBBAD0362B	Manage stress	Mandatory
BSBBAD0372B	Manage time	Mandatory
BSBBAD0683B	Use and maintain electronic mail system	Mandatory
BSBBAD0643B	Apply the principles of confidentiality and security	Mandatory
BSBCOR0382B	Display human relation skills	Mandatory
BSBBAD0392A	Transcribe and produce text from notes	Mandatory
BSBBAD0522B	Process human resource documents and inquiries	Mandatory
BSBBAD0632B	Maintain and issue stock items	Mandatory
BSBBAD0642B	Process accounts payable and receivable	Mandatory
BSBBAD0652B	Process financial information	Mandatory
BSBBAD0422B	Follow OHS policies and procedures in medical office	Mandatory

To obtain a Caribbean Vocational Qualification (CVQ) all Mandatory Units must be achieved.

#### Legend to Occupational Standard code

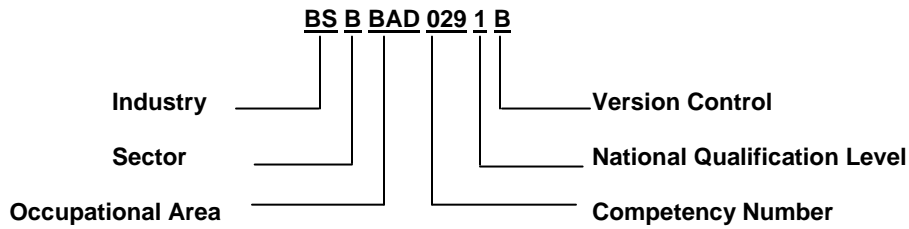
Example: CCBSB20107



KEY: CC – CARICOM; BSB – Business Services Business; 2 – Level, 001 – 07 –Year Revised

Legend to Unit Code

Example: BSBBAD0291A



KEY : BS – Business Services; B- Busniess; BAD – Business Administration; 029–unit # ; 1 – Level 1; B – first version

## ACKNOWLEDGEMENTS

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### Members of the (Occupational area/Sector) Lead Body:

<b>Name</b>	<b>Organisation</b>
Bridgette Steele	Carpet Care
Dean Burrowes	Burrowes and Wallace (B&W)
Meredith Derby	MGO Consult and Training
Michael Shilletto	Applied Business Solutions
Beverley Oliver-Cunningham	Procurement and Inventory Manager, Edna Manley College for Visual and Performing Arts.
Hazel Oconnor	NCU Entrepreneurial
Debra Williams-Grant	Managing Director Focus Business Development Consultants

**Country of Origin:** JAMAICA

### Qualification Overview

**Who the qualification is for:** The supervised skilled worker in Business Administration (Secretarial Skills).

### Persons who complete this qualification may be employed in the following jobs:

- *Typist*
- *Office Administrative Assistant*
- *Personal Assistant*

### ***Occupational Standards can also be used to:***

- Prepare job descriptions and specifications
- Determine recruitment criteria
- Appraise staff performance objectively
- Identify skill and training gaps and needs
- Conduct labour market analyses
- Develop curriculum
- Assess the effectiveness of training programmes
- Determine compensation and rewards

### ***The benefits of acquiring the CVQ to Candidates***

- Provide a basis for articulation and accreditation
- Provides a broad-based preparation for employment
- Is an alternative route to further / higher education
- 
- Complements and has parallel standing with academic qualifications
- Provides enhanced employability and higher earning potential
- Facilitates an apprenticeship with actual work experience
- Equips candidates with the knowledge, skills and attitudes for the workplace
- Past work experience and skills can count towards achieving the CVQ
- Allows for continuity whereby if a candidate cannot complete the CVQ at a centre or school, they can continue at another approved centre
- CVQ's are recognized qualifications and facilitates free movement of labour throughout CARICOM

### ***The benefits of the CVQ to Employers***

- Provides a larger cadre of skilled employees/candidates to choose from
- Reduces cost of recruiting and selecting the ideal job candidate
- Reduces cost for training workers
- Ensures higher levels of productivity

### ***The benefits of the CVQ to the Caribbean region:***

- Produces a higher skilled workforce that is ready to adapt to ever-changing global demands
- Provides greater access for persons to achieve higher qualifications
- Contributes to the region's human resource capacity development

## BSBBAD0032B Use reminder systems

### Unit Descriptor:

This unit deals with the skills and knowledge required, in the use of a reminder system, when executing administrative and management support services to an organisation.

ELEMENTS		PERFORMANCE CRITERIA	
Candidates must be able to:			
1.	Organise and maintain appointment and reminder systems	1.1	Appointments are allocated within available time schedules and confirmed.
		1.2	Dates, which are not available for appointments, are appropriately indicated in diary.
		1.3	Manager's preferences are considered when making appointments.
2.	Schedule appointments	2.1	Appointments are tactfully cancelled/rescheduled as soon as possible.
		2.2	Appointment diaries are maintained frequently so that information is always up-to-date.
		2.3	Appointments are appropriately spaced, including adequate travelling time.
		2.4	Essential information and action notes are monitored.
3.	Use reminder systems	3.1	Timely reminders are made to the manager regarding appointments.
		3.2	Visual/memory aids and follow-up systems are accurately maintained.
		3.3	Security and confidentiality procedures are implemented and maintained.

## RANGE STATEMENT

All range statements must be assessed.

Competent performance of the criteria must be demonstrated in the following:

- |                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                      |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>1. Types of appointments to include:</p> <ul style="list-style-type: none"> <li>• appointments with external business associates</li> <li>• appointments with employees</li> <li>• social appointments</li> <li>• business meetings i.e. board meetings, committee meetings</li> </ul> | <p>2. Dates not available for appointments to include:</p> <ul style="list-style-type: none"> <li>• standing meetings</li> <li>• vacation</li> <li>• public holidays</li> <li>• other out-of-office dates</li> </ul> |
| <p>3. Manager's preferences to include:</p> <ul style="list-style-type: none"> <li>• work habits</li> <li>• preferences regarding the timing of certain types of appointments</li> </ul>                                                                                                  | <p>4. Reminder systems to include:</p> <ul style="list-style-type: none"> <li>• charts</li> <li>• tickler system</li> <li>• loose-leaf diaries</li> <li>• bound diaries</li> <li>• electronic diaries</li> </ul>     |

Diaries includes:

- manager's
- secretary's
- desk organizer

Work processes:

- manual methods
- computerised diary management systems

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the method to identify and document relevant information
2. What are the manager's preferences when making appointments
3. how to use time management skills to allow sufficient time between appointments
4. how to research in order to select categories by which to organise information
5. how to utilise the relevant technology to develop reminder technique
6. how to consult with participants and orally present written reminder with a view to seeking clarification if needed

## EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

Evidence should be collected over a set period of time, which is sufficient to include dealing with an appropriate range and variety of situations.

### (1) Critical Aspects of Evidence

Ability to:

- a. Follow instructions given.
- b. Seek advice and acts on feedback from supervisors and colleagues on schedules and events.
- c. Use available business technology appropriate to the task, under direct instruction.

### (2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic.

Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report. The candidate must have access to appropriate documentation and resources normally used in the workplace.

### (3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

**BSBBAD0212B: Process mail****Unit Descriptor:**

The unit covers receiving and distributing incoming mail, collecting and despatching outgoing mail, and organising and sending electronic mail. It also covers collating and despatching bulk mail.

**ELEMENTS****PERFORMANCE CRITERIA**

Candidates must be able to:

- |    |                                                 |     |                                                                                                                       |
|----|-------------------------------------------------|-----|-----------------------------------------------------------------------------------------------------------------------|
| 1. | Receive and distribute incoming mail            | 1.1 | Incoming mail is checked and recorded in accordance with organisational policies and procedures.                      |
|    |                                                 | 1.2 | Original documents are processed according to the firm's procedures.                                                  |
|    |                                                 | 1.3 | Titles and locations of company personnel and departments are identified.                                             |
|    |                                                 | 1.4 | Urgent and confidential mail is identified and distributed promptly in accordance with organisational requirements.   |
|    |                                                 | 1.5 | Mail is sorted and despatched to the nominated person/location in accordance with organisational requirements.        |
|    |                                                 | 1.6 | Damaged, suspicious or missing items are recorded and/or reported promptly.                                           |
| 2. | Receive and despatch outgoing mail              | 2.1 | Outgoing mail is collected, checked and sorted to ensure all items are correctly prepared for despatch.               |
|    |                                                 | 2.2 | The most appropriate method of delivery is determined and appropriate envelopes are selected and addressed correctly. |
|    |                                                 | 2.3 | Outgoing mail is recorded in register and processed for despatch in accordance with organisational requirements.      |
|    |                                                 | 2.4 | Mail is despatched using the most appropriate delivery method to meet designated timelines.                           |
| 3. | Collate and despatch documents for bulk mailing | 3.1 | Quantities/resources/time to complete bulk mailing of documents is estimated correctly.                               |
|    |                                                 | 3.2 | Documents are collated as required                                                                                    |
|    |                                                 | 3.3 | Envelopes are sorted and batched in accordance with specifications.                                                   |



- |    |                                         |                                                                     |                                                                                                                                                       |
|----|-----------------------------------------|---------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | 3.4                                     | Where appropriate, courier service bulk mail satchels are employed. |                                                                                                                                                       |
|    | 3.5                                     | Numerical information is self-checked.                              |                                                                                                                                                       |
|    | 3.6                                     | Relevant carrier lodges batched items in time for delivery.         |                                                                                                                                                       |
| 4. | Organise urgent and same day deliveries | 4.1                                                                 | Items for urgent delivery are weighed, packaged and addressed in accordance with organisational requirements and the carrier's specifications.        |
|    |                                         | 4.2                                                                 | Delivery options are evaluated and the best option for delivery is selected.                                                                          |
|    |                                         | 4.3                                                                 | Lodgement or pick up of emergency deliveries is organised and followed-up where necessary.                                                            |
| 5. | Organise and send electronic mail       | 5.1                                                                 | Distribution lists are prepared/maintained in accordance with organisational requirements.                                                            |
|    |                                         | 5.2                                                                 | Mail message/s are checked for accuracy, attachments are identified and prepared in accordance with organisational and service provider requirements. |
|    |                                         | 5.3                                                                 | Outgoing mail is recorded/stored in accordance with organisational requirements.                                                                      |

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

- |                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                              |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Sorting mail may include:                                                                                                                                                                                                                                                                                                                                                             | 2. Delivery of urgent and confidential mail may include:                                                                                                                                                     |
| <ul style="list-style-type: none"> <li>• separating urgent mail to be distributed first</li> <li>• sorting by departments</li> <li>• sorting by location</li> <li>• sorting by seniority of personnel</li> <li>• separating internal (organisational) mail and external mail</li> <li>• separating by order of importance for each individual</li> <li>• separating junk mail</li> </ul> | <ul style="list-style-type: none"> <li>• separating and prioritising urgent mail</li> <li>• immediate, hand delivery, express post, and registered mail</li> <li>• urgent and same day deliveries</li> </ul> |

3. Nominated person/location may include:
  - department
  - individual addressee
  - administrative support person
  - sorting invoices, cheques and accounts
  - adding a circulation slip
4. Mail records may include:
  - electronic systems (specialist software, database, spreadsheet)
  - paper based (mail book, form, file)
5. Damaged, suspicious or missing items may include:
  - mail exposed to the weather (water damage from rain)
  - mail roughly handled (broken contents, torn address labels)
  - pilfered mail (contents may be missing, parcels slit open)
  - mail that looks unusual
  - mail that makes noises
  - mail with a strange smell
  - mail that looks like it has been tampered with (re-sealed mail)
6. Action in relation to damaged, missing or suspicious items may include:
  - contacting the sender to ensure everything sent was received
  - negotiating the replacement of missing or damaged items with the sender
  - filling out forms for the sender's insurance company
  - not touching or moving suspicious mail
  - calling the supervisor or security staff immediately
7. Correctly preparing mail items for despatch may include:
  - checking that the address details and layout are correct
  - checking that the letter and envelope are addressed to the same person
  - checking that the letter has been signed
  - checking enclosures
  - checking that the address is not obscured
  - checking that the return address is included
  - determining the most appropriate carrier
  - ensuring that the correct requirements for the chosen carrier are being followed
  - preparing bulk mail outs
  - ensuring that post office preferred requirements are met
8. Records of outgoing mail may include:
  - date of despatch
  - sender
  - sender's department
  - addressee/organisation
  - method of despatch (courier regular mail, express post)
  - reference number
  - receipts attached where appropriate
  - contents
9. Processing mail for despatch may include:
  - weighing calculating and paying for postage
  - registering mail
  - preparing packages for mailing
  - using franking machine
  - preparing packages & mail for freight express or private carriers
10. The firm's policies and procedures may include:
  - security procedures
  - mail register
  - confidential mail procedures
  - delivery/despatch of urgent mail

## 11. Records of outgoing mail may include:

- date of despatch
- sender
- sender's department
- addressee/organisation
- method of despatch (courier regular mail, express post)
- reference number
- receipts attached where appropriate
- contents

## 13. Preparing paper based attachment/enclosures may include:

- checking that documents are in correct sequence
- checking that the address details and layout are correct
- checking that the letter and envelope are addressed to the same person
- checking that the letter has been signed
- checking enclosures

## 15. Preparing attachments for electronic mail may include:

- checking that the file size will negotiate the Internet Service Provider gateway
- separating large documents into a number of files
- compressing files
- preparing self-executable files

## 17. Delivery options may include:

- express mail
- overnight bag
- courier

## 12. Distribution lists may include:

- electronic address books
- database or spreadsheet records
- word processing tables or data files paper based
- Maintenance of distribution lists may include:
  - deleting records
  - adding new records
  - updating records or deleting returned mail addressees

## 14. Best option may be determined by:

- cost
- time constraints
- delivery location
- nature of contents (e.g. bulky, fragile, confidential)
- quantity of delivery items
- document collation requirement
- bulk mail batching requirements

## 16. Checking electronic or paper based mail for accuracy may include:

- spelling
- grammar
- punctuation
- intended meaning
- addressee

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are relevant legislation from all government agencies that affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
2. What are the organisational structure
3. What are the titles, roles and locations of the organisation's personnel
4. What are the range of mail services available
5. What are the procedural requirements for receiving/despaching and prioritising correspondence
6. What are the organisational policies and procedures that are specific to handling electronic mail
7. how to keep records, check accuracy of written material and follow policies and procedures
8. how to check for weights and addresses; sort, collate and estimate time for mail despatches and bulk mail outs
9. how to receive instructions of several steps to complete task, give information to others and consult with or question supervisor and peers to clarify information
10. how to use electronic mail
11. how to solve problems e.g. choose appropriate delivery method for urgent documents
12. how to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

## EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit. This is an integral part of the assessment of competency and should be read in conjunction with the Range Statement.

### (1) Critical Aspects of Evidence

- a. Demonstration of all elements of competency and their performance criteria
- b. Knowledge of the organisation's policies and procedures relating to mail and electronic mail
- c. Justification for choice of carrier for urgent and same day deliveries
- d. Knowledge of carriers' requirements (e.g. postal and courier)

### (2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report. The candidate must have access to appropriate documentation and resources normally used in the workplace.

### (3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

**BSBCOR0252B: Exercise initiative in a business environment****Unit Descriptor:**

This unit covers the skills and knowledge required to exercise initiative and influence others in a business environment. It includes making decisions in accordance with organisational requirements.

<b>ELEMENTS</b>	<b>PERFORMANCE CRITERIA</b>
Candidates must be able to:	
1. Model high standards of business practices	1.1 Own work practices are consistent with organisational requirements and with agreed roles and responsibilities. 1.2 Personal work goals are identified, prioritised and pursued in accordance with organisation's goals and objectives. 1.3 Own work practices and behaviour are amended to reflect performance feedback and promote continuous improvement. 1.4 Practices detrimental to the organisation are identified and communicated within appropriate organisational requirements.
2. Influence individuals and groups positively	2.1 Initiative style is consistent with organisational requirements and agreed roles and responsibilities. 2.2 Opportunities are identified and used to raise awareness and commitment to the goals and values of the organization. 2.3 Appropriate negotiation skills are used to promote group consensus and a common understanding of organisational requirements. 2.4 Coaching and mentoring assistance is provided to individuals and groups to support the achievement of work priorities. 2.5 Encouragement is provided to others to develop innovative practices and strategies consistent with organisational requirements.

- |                            |     |                                                                                                                                |
|----------------------------|-----|--------------------------------------------------------------------------------------------------------------------------------|
|                            | 2.6 | Regular performance feedback is provided to individuals and groups in accordance with organisational requirements.             |
| 3. Make informed decisions | 3.1 | Decision-making processes are participative and used to review work of the group and to allocate appropriate responsibilities. |
|                            | 3.2 | Parameters for decisions are clear and options are based on valid and reliable information.                                    |
|                            | 3.3 | Decisions are consistent with applicable ethical and regulatory obligations and organisational requirements.                   |
|                            | 3.4 | Feedback is given to clarify the impact of decisions                                                                           |

## RANGE STATEMENT

1. Statutory Legislation, codes and national standards relevant to the workplace which may include:
  - relevant legislation from all government agencies that affect 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
2. Organisational requirements may be included in:
  - quality assurance procedure manuals
  - code of conduct/code of ethics/statement of values
  - performance appraisal system and personnel procedures
  - goals, objectives, plans, systems and processes
3. Initiative styles and methods may include:
  - techniques for initiating action and directing decision making strategies for presenting a confident, assured and unhesitant manner in challenging situations
4. Roles and responsibilities may include:
  - job description and employment arrangements
  - organisation's policy relevant to work role
  - team structures
  - supervision and accountability requirements including Occupational Health and Safety
  - skills, training and competencies
  - Code of Conduct
  - legal and organisational policy/guidelines and requirements
  - business and performance plans
  - access and equity principles and practices
  - anti-discrimination and related policy
  - continuous improvement of processes and organisational standards
  - Occupational Health and Safety policies, procedures and programs
5. Interpersonal skills may include:
  - using appropriate body language
  - summarising and paraphrasing
  - consultation methods, techniques and protocol
  - seeking feedback from group members to confirm understanding

6. The organisation's goals and objectives may be:
- stated or implied by the way the organisation conducts its business including:
  - organisational values and behaviours
  - flexibility, responsiveness
  - financial performance
  - work procedures and/or procedure manuals
  - people management
  - interpersonal communication
  - business planning
  - marketing and customer service
  - organisational values and behaviours
  - work procedures and quality assurance manuals
7. Feedback on performance may include:
- formal/informal performance appraisals
  - obtaining comments from supervisors and colleagues
  - obtaining comments from clients
  - personal reflective behaviour strategies
  - routine organisational methods for monitoring service delivery
  - strategies for not accepting unreasonable expectations
  - maintaining ethical practice and beliefs in the face of opposition
  - modelling behavioural and personal presentation standards
  - time management
  - strategies for acknowledging and respecting the attitudes and beliefs of others
  - techniques for promoting active and genuine participation
8. Negotiation skills may include:
- assertiveness
  - collaboration
  - solution designing
  - confidence building
  - conflict reduction
  - stress management
  - empathising
9. Opportunities to develop innovative work practices may include:
- obtaining feedback from supervisors and colleagues
  - obtaining feedback from clients
  - personal reflective behaviour strategies
10. Coaching and mentoring assistance may include:
- providing feedback to another team member
  - fair and ethical practice
  - non-discriminatory processes and activities
  - respecting the contribution of all participants and giving credit for achievements
  - presenting and promoting a positive image of the collective group
  - problem solving
  - providing encouragement
- routine organisational methods for monitoring service delivery
  - networking within the organisation and the industry
  - job rotation/exchanges

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the relevant legislation from all government agencies that affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity & industrial relations
2. What are the principles and techniques associated with influencing others, establishing effective consultative processes and making decisions
3. What are the characteristics of a positive role model
4. What are the methods which can be used to monitor and introduce practices to improve work performance
5. What are the principles and techniques associated with the organisation of teams, team goal setting and delegating responsibility/accountability to teams
6. What are the use of feedback to achieve positive outcomes
7. What are the organisation's policies, plans and procedures
8. What are the information systems and their use
9. What are the principles of effective negotiation
10. What are the organisation's procedures, individual goals and objectives
11. how to proofread and edit own work
12. how to communicate effectively to request advice, receive feedback and work with a team
13. how to maintain effective relationships and manage conflicts
14. how to plan and organise work arrangements
15. how to determine outcomes
16. how to solve problems including unexpected difficulties
17. how to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

- a. Giving constructive feedback.
- b. Communicating priorities, goals and actions.
- c. Facilitating achievement of personal goals and work objectives.
- d. Working effectively in a team environment.
- e. Consulting with colleagues to encourage a process of continuous improvement.

### (2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report. The candidate must have access to appropriate documentation and resources normally used in the workplace.

### (3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.



**BSBBAD0302B: Produce business documents**

## Unit Descriptor:

This unit covers the skills and knowledge required to produce various business documents. It includes the skills and knowledge required to select and use a range of functions on a computer application.

**ELEMENTS****PERFORMANCE CRITERIA**

Candidates must be able to:

- |    |                                |     |                                                                                                                                            |
|----|--------------------------------|-----|--------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Identify document requirements | 1.1 | Workplace requirements entry, storage, output and quality of information for presentation are identified prior to design of documentation. |
|    |                                | 1.2 | Appropriate technology and software applications are selected and utilised to produce required business documents.                         |
| 2. | Design document                | 2.1 | Files and records are identified, opened, generated and amended according to task and organisational requirements.                         |
|    |                                | 2.2 | Ranges of functions are used to ensure consistency of design and layout.                                                                   |
|    |                                | 2.3 | Input devices are operated within designated speed and accuracy requirements.                                                              |
|    |                                | 2.4 | Document design is appropriate for the presentation and appearance of information.                                                         |
| 3. | Produce document               | 3.1 | Manuals, training booklets and/or help-desks are used to overcome basic difficulties with document design and production.                  |
|    |                                | 3.2 | Documents produced are checked to ensure they meet task requirements for style and layout.                                                 |
|    |                                | 3.3 | The range of functions incorporated into the document design reflects the nominated requirements of the workplace.                         |
|    |                                | 3.4 | Document production is completed within designated timelines according to organisational requirements.                                     |
|    |                                | 3.5 | Storage of documents is appropriate and applications are exited without damage to or loss of information.                                  |

## RANGE STATEMENT

All range statements must be assessed.

1. Statutory requirements, codes and national standards relevant to the workplace which may include:
  - 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
2. Technology may include:
  - computers
  - scanners
  - photocopiers
  - printers
3. Software may include:
  - word processing packages
  - spreadsheet packages
  - database packages
  - accounting packages
  - presentation packages
4. Business documents may include:
  - newsletters
  - client databases
  - proposals
  - reports
  - accounts statements
  - project reviews
  - web pages
5. Functions used when designing a document may include:
  - using styles
  - merging documents
  - table formatting
  - using columns
  - spell checking
  - editing
  - alternating headers and footers
6. Organisational requirements may include:
  - quality assurances and/or procedures manuals
  - log-on procedures
  - legal and organisational policies/guidelines and requirements
  - correctly identifying and opening files
  - saving and closing files
  - locating data
  - storing data
  - budgets
  - Occupational Health and Safety policies, procedures and programs
  - security
  - manufacturer's guidelines
  - storage/filing of hard copies of incoming and outgoing facsimiles
  - storage/filing of incoming and outgoing correspondence
  - storage of documents may include:

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the functions and features of contemporary computer applications
2. What are the techniques and methods used to check accuracy
3. How to select appropriate technology for production requirements
4. organisational requirements for document design e.g. style guide
5. How to read and understand a variety of texts; prepare general information and papers according to target audience; spell with accuracy; use grammar and punctuation effectively as an aid to understanding
6. How to proofread and edit to ensure clarity of meaning and conformity to organisational requirements
7. How to check for accuracy and consistency of information
8. How to determine document design and production processes
9. How to access and retrieve data
10. How to use keyboarding and computer skills to complete a range of formatting and layout tasks

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

- a. Selects and applies appropriate technology and software.
- b. Designs and produces business documents using a software application.
- c. Uses a range of functions, which enhance the presentation, and readability of the document.
- d. Applies OHS procedures for set up of workstation and operation of computer.
- e. Uses data storage options.

### (2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: oral/written questioning and practical demonstrations, workplace document and third party report. The candidate must have access to appropriate documentation and resources normally used in the workplace.

### (3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

## BSBBAD0322B: Organise business travel

### Unit Descriptor:

This unit covers organising domestic and overseas business trips associated itineraries and making travel arrangements.

### ELEMENTS

### PERFORMANCE CRITERIA

Candidates must be able to:

- |    |                                                              |     |                                                                                                                                                          |
|----|--------------------------------------------------------------|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Organise business itinerary for domestic and overseas travel | 1.1 | Purpose of domestic and overseas travel, budgets, meeting requirements and traveller preferences are confirmed.                                          |
|    |                                                              | 1.2 | Points of contact and names of contact persons are identified; arrangements for meetings are made and confirmed in accordance with planned itinerary.    |
|    |                                                              | 1.3 | Daily itineraries are prepared with appointments, arrival and departure times, accommodation and <i>other</i> details in accordance with travel purpose. |
|    |                                                              | 1.4 | Documents and support material for meetings are sourced and prepared within designated timelines.                                                        |
|    |                                                              | 1.5 | Itinerary is prepared in accordance with meeting requirements, travel demands and occupational health and safety requirements for the traveller.         |
|    |                                                              | 1.6 | Itinerary and meeting documents are despatched to the traveller within designated timelines.                                                             |
| 2. | Make travel arrangements                                     | 2.1 | Bookings are made in accordance with organisational policies and procedures for business travel.                                                         |
|    |                                                              | 2.2 | Travel documents are identified, arranged and recorded in accordance with itinerary and individual requirements.                                         |
|    |                                                              | 2.3 | Travel arrangements are confirmed and confirmation documents checked and despatched to the traveller within designated timelines.                        |
|    |                                                              | 2.4 | Alternative arrangements are negotiated and confirmed in response to changed requirements.                                                               |

- 2.5 Communication arrangements are negotiated and confirmed in accordance with organisational requirements.
- 3. Arrange credit facilities
  - 3.1 Methods of payment are checked and confirmed.
  - 3.2 Credit arrangements are made in accordance with organisational policy and procedures.

## RANGE STATEMENT

1. Legislation, codes and national standards relevant to the workplace which may include:
  - relevant legislation from all government agencies that affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, and industrial relations
  - relevant industry codes of practice
2. Travel demands may include:
  - mode of travel
  - class of travel
  - transport timetables
  - connections and transfers
  - time differences
  - budget
  - available accommodation
  - class of accommodation
  - time management
  - spending money

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the relevant legislation from all government agencies that affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, and industrial relations
2. What are the policies and procedures regarding travel
3. What are the internet / web sites
4. What are the itinerary formatting and preparation
5. What are the filing systems
6. What are the checklist systems
7. What are the booking procedures
8. What are the sources of relevant documents and support material
9. how to read a variety of texts e.g. policy and procedures, travel timetables, conference brochures
10. how to write clear and detailed instructions in logical sequence
11. how to research to locate specific information regarding appropriate transport, meeting venues, accommodation, contacts etc; analyse and summarise data to produce schedule/itinerary/report
12. how to communicate to participate effectively in spoken interactions; listen to detailed oral instructions; question to clarify and evaluate information; offer opinion on information gathered from a variety of sources
13. how to allow sufficient time to prepare business and travel documentation
14. how to solve problems in order to choose appropriate solution from a range of available solutions
15. how to estimate time and plan
16. how to compare and calculate money
17. how to access the Internet and make on-line bookings
18. how to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

## EVIDENCE GUIDE

1. **Critical Aspects of Evidence**
  - confirm travel, budgets, meeting requirements and traveller preferences
  - make and confirm arrangements for meetings in accordance with planned itinerary
  - prepare daily itineraries with appointments, arrival and departure times, accommodation and other details in accordance with travel purpose
  - source and prepare documents and support material for meetings
  - make bookings in accordance with organisational policies and procedures for business travel
  - identify and arrange travel documents and confirm travel arrangements in accordance with itinerary and individual requirements
  - negotiate and confirm communication arrangements in accordance with organisational requirements
  - check and confirm methods of payment and make credit arrangements in accordance with organisational policy and procedures

**2. Method of Assessment**

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations, workplace document and third party report. The candidate must have access to appropriate documentation and resources normally used in the workplace.

**(3) Context of Assessment**

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

**BSBBAD0332B: Prepare and process financial/business documents****Unit Descriptor:**

This unit covers the processing of financial transactions including petty cash, invoicing and banking in a business environment.

<b>ELEMENTS</b>		<b>PERFORMANCE CRITERIA</b>	
Candidates must be able to:			
1.	Process petty cash transactions	1.1	Petty cash claims and vouchers are checked for approval, accuracy and authenticity prior to processing.
		1.2	Petty cash transactions are processed and recorded within designated time limits.
		1.3	Irregularities are noted and referred to nominated person for resolution.
		1.4	Transactions are checked and petty cash book balanced according to organisational requirements.
2.	Prepare and process banking documents	2.1	Deposits and withdrawals are accurately entered and balanced according to organisational requirements.
		2.2	Cheques and credit card vouchers are checked for validity (signatures, dates, amounts) before processing.
		2.3	Cash, cheques and credit cards are listed on banking forms in accordance with the banking institution's guidelines.
3.	Reconcile invoices for payment to creditors	3.1	Discrepancies between invoices and source documents are identified and reported to nominated person for resolution.
		3.2	Adjustments and errors are identified, reported and rectified in accordance with organisational requirements.
		3.3	Creditor enquiries are answered and/or referred to nominated person for resolution.
4.	Prepare invoices for debtors	4.1	Invoices are prepared accurately in accordance with organisational requirements.
		4.2	Invoices are distributed to nominated person for verification prior to despatch.
		4.3	Adjustments are made as required in accordance with organisational requirements.



- 4.4 Invoices and other related documents are copied and filed for auditing purposes.

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

1. Statutory Legislation, codes and national standards relevant to the workplace which may include:
  - relevant legislation from all government agencies that affect 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
2. Checking claims for accuracy and authenticity may include:
  - requiring a receipt
  - ensuring items purchased are business related
  - accepting claims from authorised personnel only
3. Recording petty cash transactions may include use of:
  - paper based system
  - electronic system
  - organisational accounting system
4. Nominated persons include:
  - petty cash officer
  - supervisor
  - accounts department staff
5. Banking institution's guidelines may include:
  - deposit slips filled out accurately
  - cash bundled
  - banking summary provided
  - banking electronically
6. Source documents may include:
  - journals
  - purchase orders
  - invoices
  - receipts
  - delivery dockets/receipts
  - credit notes
  - statements
  - remittance advices
  - deposit books
7. Organisational requirements may include:
  - procedures for totalling and balancing petty cash book
  - legal and organisation policies/guidelines and requirements
  - all cash being accounted for at all times
  - procedures for entering and balancing deposits
  - procedures for checking validity of cheques and credit card vouchers
  - security procedures
  - Occupational Health and Safety policies, procedures and programs
  - format of documents for reimbursement
  - guidelines for updating receipts
  - accounting and auditing standards specified by the accounting board
  - designated timelines for petty cash period/pay period

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the relevant legislation in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
2. What are the procedures for cash and non-cash handling
3. What are the organisational policies and procedures relating to petty cash, banking, security, invoicing
4. What are the procedures relating to debtors and creditors
5. What are the banking institution's guidelines
6. What are the methods and techniques for simple calculations
7. What are the methods for presenting financial data
8. How to read, record and interpret financial information
9. How to maintain records and banking documents
10. How to check accuracy of calculations and reconciliation of accounts
11. How to proofread in order to maintain accuracy of information
12. How to communicate effectively including the reporting of irregularities and errors
13. How to relate to people from a range of social, cultural, ethnic backgrounds and physical and mental abilities

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

- a. Application of organisation's policy and procedures for financial transactions in regard to petty cash, invoicing and bank processes.
- b. Accurate processing of petty cash claims and vouchers including identification of irregularities or errors.
- c. Accurate preparing and processing of banking documents including identification of irregularities or errors.
- d. Accurate reconciliation and payment of invoices for creditors and debtors including identification of irregularities or errors.
- e. The recording and reporting of transactions are done efficiently.

### (2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning, practical demonstrations, workplace documents and third party report. The candidate must have access to appropriate documentation and resources normally used in the workplace.

### (3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

**BSBBAD0412B: Promote products and services****Unit Descriptor:**

This unit covers the skills and knowledge required to provide advice and information within an organisation about the development, promotion and distribution of its products and services.

**ELEMENTS****PERFORMANCE CRITERIA**

Candidates must be able to:

1.	Develop and maintain knowledge of products and services	1.1	A comprehensive knowledge and understanding of industry products and services is actively and regularly researched from authoritative sources.
		1.2	Characteristics of products and services are identified and understood using available product and service documentation.
		1.3	Information on products and services is accurately documented and maintained in a format consistent with organisational requirements.
		1.4	Acquired knowledge is applied to improve quality within personal work areas.
2.	Recommend products and services	2.1	Recommendations on products and services are in line with organisational requirements.
		2.2	Recommendations emphasise product and service issues relevant to client needs.
		2.3	Evidence in support of recommendations is verifiable and presented in a suitable format.
		2.4	Recommendations are structured to identify clear benefits to clients and the organization.
3.	Advise on promotional activities	3.1	Advice provided is clear and supported by verifiable evidence and is compatible with organisational requirements.
		3.2	Promotional documentation and materials are appropriate to presentation of the organisation's products and services.
		3.3	Costs of promotional activities conform to budget resources
		3.4	Impact of promotional activities is estimated from verifiable customer feedback sources.

- 3.5 Benefits of promotional activities are evaluated and incorporated in plans for future promotional activities.

## RANGE STATEMENT

The following variables may be present for this particular unit:

- |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                                                                                                                                                 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>1. Legislation, codes and national standards relevant to the workplace which may include:</p> <ul style="list-style-type: none"> <li>• relevant legislation from all government agencies that affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination</li> <li>• relevant industry codes of practice</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                      | <p>2. Industry products and services may include but is not limited to:</p> <ul style="list-style-type: none"> <li>• organisation's products</li> <li>• competitors products and services</li> <li>• emerging products and services</li> <li>• complementary products and services</li> <li>• historical products and services</li> </ul>                                                       |
| <p>3. Organisational requirements may include:</p> <ul style="list-style-type: none"> <li>• quality assurances and/or procedures manuals</li> <li>• goals, objectives, plans, systems and processes</li> <li>• legal and organisational policy/guidelines and requirements</li> <li>• Occupational Health and Safety policies, procedures and programs</li> <li>• confidentiality and security requirements</li> <li>• access and equity principles and practice</li> <li>• ethical standards</li> <li>• quality and continuous improvement processes and standards</li> <li>• defined resource parameters</li> <li>• who is responsible for products or services</li> <li>• pricing and discount policies</li> <li>• replacement and refund policy and procedures</li> <li>• payment and delivery options</li> <li>• filing and documentation storage processes</li> </ul> | <p>4. Information may include:</p> <ul style="list-style-type: none"> <li>• competitive features of products or services</li> <li>• product trends</li> <li>• sales trends</li> <li>• problems with products or services</li> <li>• innovations</li> <li>• cost and production data</li> <li>• distribution processes</li> <li>• sales records (monthly forecasts, targets achieved)</li> </ul> |
| <p>5. Product and service documentation may include:</p> <ul style="list-style-type: none"> <li>• operational guidelines</li> <li>• marketing data</li> <li>• colleagues' knowledge</li> <li>• consumer reports</li> <li>• industry reports</li> <li>• sales figures</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <p>6. Authoritative sources may include:</p> <ul style="list-style-type: none"> <li>• industry associations</li> <li>• authorised suppliers</li> <li>• industry conferences</li> <li>• recognised industry media sources</li> </ul>                                                                                                                                                             |

7. Verifiable customer feedback sources may include:
- customer satisfaction questionnaires
  - audit documentation and reports
  - quality assurance data
  - returned goods
  - lapsed clients
  - service calls
  - complaints
8. Promotional activities may include:
- media announcements
  - employee functions
  - client functions
  - product launches
  - advertisements
  - web pages
9. Product and service issues may include:
- market share data
  - sales figures
  - organisational product knowledge
  - customer delivery
  - faults
  - production down-time

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the relevant legislation from all government agencies that affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination.
2. What are the organisation's products and services
3. What are the organisation's business structure
4. What are the organisation's policy and procedures for customer service including handling customer complaints
5. What are the product and service standards and best practice models
6. What are the principles and techniques of public relations and product promotion
7. What are the strategies for planning and monitoring activities
8. What are the consultation methods, techniques and protocol
9. What are the mechanisms to obtain and analyse customer feedback
10. How to read and understand a variety of texts; prepare general information and papers according to target audience; spell with accuracy; use grammar and punctuation effectively as an aid to understanding
11. How to proofread and edit to ensure clarity of meaning and conformity to organisational requirements, check for accuracy and consistency of information
12. How to select and use technology appropriate to a task
13. How to communicate including monitoring and advising on customer service strategies
14. How to deal with customer enquiries or complaints
15. How to write reports and make presentations
16. assess information for relevance and accuracy; source additional information as required
17. How to identify trends and positions of products and services
18. How to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

## EVIDENCE GUIDE

### 1. Critical Aspects of Evidence

- a. Preparing and structuring advice on products and services.
- b. Researching market availability of products and services.
- c. Conducting meetings and presentations.
- d. Assessing and reporting on customer satisfaction.
- e. Analysing sales and product development data.
- f. Identifying commercial characteristics of products and services.

### 2. Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report. The candidate must have access to appropriate documentation and resources normally used in the workplace.

### 3. Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

**BSBBAD0622B: Produce texts from audio****Unit Descriptor:**

This unit covers transcribing audiotapes and producing accurate texts from the transcriptions.

**ELEMENTS****PERFORMANCE CRITERIA**

Candidates must be able to:

- |    |                                 |     |                                                                                                                                    |
|----|---------------------------------|-----|------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Prepare for audio transcription | 1.1 | Organizational requirements relating to style, presentation and storage of texts are identified prior to commencing the task.      |
|    |                                 | 1.2 | The purpose and requirements of the text are clarified with the author.                                                            |
| 2. | Transcribe audiotape            | 2.1 | Text is produced from transcription with the required accuracy.                                                                    |
|    |                                 | 2.2 | Audio transcription reflects the intended meaning of the author/s.                                                                 |
|    |                                 | 2.3 | The meaning of unclear speech is predicted from the context and / or clarified with the author/s.                                  |
|    |                                 | 2.4 | Meaning and spelling of names or technical terms are clarified to ensure accuracy of the text.                                     |
|    |                                 | 2.5 | Text is produced within designated timelines.                                                                                      |
|    |                                 | 2.6 | Transcription is self-checked for accuracy.                                                                                        |
| 3. | Edit and revise text            | 3.1 | Final text is self-checked for accuracy, and grammar and syntax are appropriate for the intended purpose and audience of the text. |
|    |                                 | 3.2 | Text is revised, formatted, named, stored and printed in accordance with organizational and task requirements.                     |

**RANGE STATEMENT**

1. Legislation, codes and national standards relevant to the workplace which may include:
  - relevant legislation from all government agencies that affect 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
2. Required degree of accuracy of text may include:
  - correct spelling
  - correct grammar
  - intended meaning
  - correct use of technical vocabulary
  - capturing the intended meaning of the dictation
3. Designated timelines for production of text may include:
  - timeline agreed with supervisor/person requiring text
  - organization timeline e.g. minutes of meeting/agenda
4. Audio transcription may include:
  - dictation machine / dictaphone
  - audiotape
  - micro-cassette
5. Purpose of document may include:
  - formal or informal letters
  - memo
  - report
  - agenda
  - minutes
  - verbatim record of meeting
6. Self-checking transcription for accuracy may include:
  - inserting punctuation
  - clarifying names, addresses and specific spelling with information on file
7. Self-checking of text may include:
  - checking spelling
  - checking grammar
  - checking intended meaning
8. Organizational requirements may include:
  - organizational format
  - number of copies
  - author's instructions
9. Requirements of audio transcription may include:
  - verbatim record of dictation



## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the relevant legislation from all government agencies that affect business operation, especially in regard to occupational health and safety, and environmental issues, equal opportunity, industrial relations and anti-discrimination
2. What are the organization's policy and procedures requirements
3. What are the formats and styles of workplace documents
4. What are the types of audio transcriptions
5. how to use correct spelling and grammar
6. how to clarify intended meaning with dictated source and by proof reading and editing own transcription
7. how to predict words from context, interpret intonation and stress
8. how to identify different speakers from their voices
9. how to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

- a. integrated demonstration of all elements of competency and their performance criteria
- b. final text meets identified purpose and requirements of author

### (2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report. The candidate must have access to appropriate documentation and resources normally used in the workplace.

### (3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

**BSBBAD0352B: Organise meetings**

## Unit Descriptor:

This unit covers organising meetings including agendas, papers, minutes and arrangements for participants.

ELEMENTS	PERFORMANCE CRITERIA
Candidates must be able to:	
1. Make meeting arrangements	1.1 The type of meeting and its purpose are identified. 1.2 Any legal or ethical requirements are identified and complied with. 1.3 Requirements of meeting and participants are identified 1.4 Meeting arrangements are made in accordance with requirements of meeting. 1.5 Participants are advised of any changes to original meeting details.
2. Prepare documentation for meetings	2.1 Notice of meeting, agenda and meeting papers are prepared in accordance with meeting requirements. 2.2 Documentation is checked for accuracy and any errors are corrected. 2.3 Documentation is despatched to participants within designated timelines. 2.4 Spare sets of documents are prepared.
3. Record and produce minutes of meeting	3.1 Notes are taken with the required degree of speed and accuracy to ensure an accurate record of the meeting 3.2 Minutes are produced that reflect a true and accurate account of the meeting. 3.3 Minutes are checked for accuracy and submitted for approval by the nominated person. 3.4 Copies of minutes are despatched within designated timelines.

## RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment. The following variables may be present for this particular unit:

1. Legislation, codes and national standards relevant to the workplace which may include:
  - relevant legislation from all government agencies that affect 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
2. Type of meeting may include:
  - face-to-face
  - teleconference
  - videoconference
  - annual general meeting
  - board meeting
  - staff meeting
3. Legal and ethical requirements may include:
  - requirements for public meetings
  - codes of practice
  - legislation relating to companies, associations etc
4. Meeting requirements may relate to:
  - purpose of the meeting
  - meeting structure
  - voting procedures
  - number of participants
  - special needs of participants
  - specific resources and equipment required by participants e.g. video projectors
  - telephone or videoconferencing equipment
  - teleconferencing or videoconferencing meeting protocol
5. Meeting papers may include:
  - financial reports
  - chairperson's report
  - research reports
  - itemised meeting papers
  - draft documentation
  - correspondence
  - committee reports
  - minutes of previous meeting
6. Agenda may include:
  - statement of the meeting's purpose
  - date, time and location of meeting
  - welcome
  - minutes of the previous meeting
  - matters or business arising from the minutes
  - correspondence
  - reports
  - major agenda items
  - general business
  - date of next meeting
  - organising appropriate communication technology
  - establishing costs and operating within a budget
  - preparing relevant documentation for participants
  - scheduling the date and time for the meeting

Meeting arrangements may include:

- booking an appropriate venue
- organising catering
- organising accommodation and transport

## 7. Meeting style and structure may include:

- formal
- informal
- semi-formal
- structured
- self-managed

## 8. Minutes may include:

- using previous minutes to determine required format
- using organisation templates
- meeting details (e.g. title, date, time, location)
- welcome
- names of absent and attending participants
- apologies
- approval of the record of the previous minutes
- correspondence
- agenda items
- reports
- other business
- date of the next meeting
- lists rather than complete sentences
- future action
- arrangements for next meeting

**UNDERPINNING KNOWLEDGE AND SKILLS**

Candidates must know and understand:

1. What are the relevant legislation from all government agencies that affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
2. What are the policies and procedures in regard to meetings, agendas and minute-taking
3. What are the meeting terminology
4. What are the meeting structures
5. What are the meeting arrangements
6. What are the minute format
7. What are the agenda format
8. how to write and compile agenda items and record minutes; make notes from spoken texts in meetings; use a variety of strategies for planning, reviewing and proofreading documentation
9. how to communicate, co-ordinate and consult with participants; orally present written reports with a number of defined sections; clarify points made in meetings
10. how to select categories by which to organise information and assess information for relevance, accuracy
11. how to allow sufficient time to prepare for and conduct meetings
12. how to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

- a. Demonstration of all elements of competency and their performance criteria.
- b. Knowledge of meeting procedure/protocols for different types and modes of meeting.
- c. Ability to identify issues for minutes from general discussion.

### (2) Method of Assessment

In order to achieve consistency of performance, evidence should be collected over a set period of time, which is sufficient to include dealing with an appropriate range and variety of situations.

### (3) Context of Assessment

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 Competency Standards.

Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment.

Assessment should reinforce the integration of the critical employability skill and the Business Services Common Competencies for the particular CVQ-J Level. Refer to the Critical Employment Skills at the end of this unit.

**BSBBAD0362B: Manage stress**

Unit Descriptor:

This unit covers the methods in recognizing, preventing and managing stress resulting from high workloads, conflict and other sources.

ELEMENTS	PERFORMANCE CRITERIA
Candidates must be able to:	
1. Develop ways of preventing stress	1.1 Spiritual, emotional, cultural and social well-being is included in considerations. 1.2 The main areas of responsibility and activity associated with stress are pinpointed and listed. 1.3 Strategies to relieve stress that are culturally appropriate are agreed on. 1.4 Stress reduction strategies are implemented.
2. Recognise stress	2.1 The signs of stress are observed. 2.2 Stress is acknowledged. 2.3 Cultural issues are considered. 2.4 The causes of stress are analysed and listed. 2.5 Discretion is exercised.
3. Use help where necessary	3.1 Organisation resources are considered. 3.2 Family and community supports are accessed. 3.3 The need for external assistance is acknowledged. 3.4 External help is obtained only where necessary. 3.5 Discretion is exercised.
4. Monitor stress	4.1 Health and well being are given high priority. 4.2 Signs of stress are monitored. 4.3 Remedial action is taken where needed.

## RANGE STATEMENT

All range statements must be assessed

- |                                                                                                                                                                                                                                                |                                                                                                                                                                                                               |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>1. Stress reduction strategies may include:</p> <ul style="list-style-type: none"> <li>• family support</li> <li>• time out</li> <li>• group activities</li> <li>• sharing load</li> <li>• awareness raising</li> <li>• training</li> </ul> | <p>2. Signs of stress may include:</p> <ul style="list-style-type: none"> <li>• absence from work</li> <li>• poor work performance</li> <li>• conflict</li> <li>• substance abuse (alcohol, drugs)</li> </ul> |
| <p>3. Help may include:</p> <ul style="list-style-type: none"> <li>• review of job design</li> <li>• counselling</li> <li>• mediation</li> <li>• family support</li> </ul>                                                                     | <p>4. Sources of stress may include:</p> <ul style="list-style-type: none"> <li>• workloads</li> <li>• complex tasks</li> <li>• work and family conflict</li> <li>• cultural issues</li> </ul>                |

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

- |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                         |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| <p>1. what are the relevant aspects of culture which may include: cultural protocol, language, business culture family and community responsibilities</p> <p>2. what are the community participation and control in decision making which are central to organisations</p> <p>3. what are the location and resources that organisations operate in particularly where cultural, social, economic and political conditions may vary widely</p> <p>4. what are the acute resource shortages which may determine the options available</p> <p>5. what are the legal requirements under which the organisation operates</p> <p>6. what are the legal entities and funding recipients which influence decision-making</p> <p>7. what are the organisation processes</p> <p>8. what are the areas of responsibility</p> <p>9. what are the signs of stress</p> <p>10. what are the sources of outside help for stress management</p> | <p>11. how to display self-observation and self-awareness</p> <p>12. how to analyse</p> |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

- a. Demonstration of all elements of competency and their performance criteria.
- b. Stress is seen in the context of the whole being spiritual, emotional, cultural and occupational.
- c. Recognition that sources of stress include cultural and community issues and conflict between the 'two worlds'.
- d. Family is seen as the primary support for the individual
- e. Family and community strategies are preferred to external interventions.
- f. Stress is monitored and managed effectively.

### (2) Method of Assessment

Competency should be assessed through direct observation and questions related to underpinning knowledge.

Competency will be assessed under general guidance, checking at various stages of the process and at completion of the activity against performance criteria and specifications.

### (3) Context of Assessment

Competency shall be assessed in the workplace or simulated workplace environment in accordance with work practices and safety procedures.

A simulated environment may be used but such simulation must replicate conditions in terms of: performing the task; managing a number of different tasks; coping with irregularities and breakdowns in routine; dealing with the responsibilities and expectations of the supervisor, including working with others; and transferring competency to other situations.



## BSBBAD0372B: Manage time

## Unit Descriptor:

This unit covers the skills and knowledge necessary for employees to manage their time by assessing their commitments to the organization and to other matters.

**ELEMENTS****PERFORMANCE CRITERIA**

Candidates must be able to:

- |    |                                                       |     |                                                                                                                        |
|----|-------------------------------------------------------|-----|------------------------------------------------------------------------------------------------------------------------|
| 1. | Assess the commitment involved in being a Team member | 1.1 | A list of tasks involved in being a team member is developed taking into consideration the organization's objectives.  |
|    |                                                       | 1.2 | The time involved in each task is estimated.                                                                           |
|    |                                                       | 1.3 | The total time needed to meet commitments is calculated.                                                               |
| 2. | Calculate available time                              | 2.1 | Other commitments are listed and the time involved is estimated.                                                       |
|    |                                                       | 2.2 | Time available to commit to work-related activities is estimated.                                                      |
| 3. | Plan ahead for all activities                         | 3.1 | Timetables for all activities are obtained in order to determine time allocation and commitments are prioritised.      |
|    |                                                       | 3.2 | A personal action plan is developed and documented for each week and month for the coming year.                        |
|    |                                                       | 3.3 | Periods of no activity are included to allow flexibility and reduce stress.                                            |
|    |                                                       | 3.4 | Potential and actual changes are identified and managed appropriately to ensure least disruption of tasks in progress. |
| 4. | Review progress and modify diary/plan                 | 4.1 | The action plan is followed.                                                                                           |
|    |                                                       | 4.2 | Progress is reviewed and changes made to commitments and times as appropriate.                                         |

## RANGE STATEMENT

All range statements must be assessed.

1. Tasks involved in being a Team member may include:
  - meetings
  - community consultation
  - group consultation
  - training
2. Other commitments may include:
  - other organisations
  - family
  - other cultural events
3. The action plan may include:
  - personal commitments
  - team commitments
  - community commitments
  - written forms, other forms

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. what is the relevant aspects of culture that may include: cultural protocol, language, business culture and community responsibilities
2. what is the community participation and control in decision-making
3. what is the acute resource shortages which may determine the options available
4. what is the responsibilities as a team member
5. how to estimate time demands
6. how to plan
7. how to prioritise
8. how to review and revise plans

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

- a. Demonstrates all elements of competency and their performance criteria.
- b. Time is managed to allow attention to all commitments.

### (2) Method of Assessment

Competency should be assessed while tasks are undertaken.

Assessment should involve:

- observation of work processes
- questioning related to underpinning knowledge

Assessment may be by intermittent checking at various stages of each task application or at the completion of each task in accordance with the performance criteria.

### (4) Context of Assessment

This unit of competency should be assessed through the performance of duties, but in the event that there is no opportunity to observe such a performance a simulated environment can be used. Such simulation must replicate conditions in terms of: performing the task; managing a number of different tasks; coping with irregularities and breakdowns in routine; dealing with the responsibilities and expectations of the job, including working with others.

**BSBBAD0683B: Use and maintain electronic mail system**

**Unit Descriptor:**

This unit is related to e-correspondence policies and the maintenance of the electronic mail system in organizations.

**ELEMENTS**

**PERFORMANCE CRITERIA**

Candidates must be able to:

- |    |                                         |     |                                                                                                                                                                                                           |
|----|-----------------------------------------|-----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Access and organise electronic mail     | 1.1 | Electronic mail is checked for completeness, opened or forwarded in accordance with organisational policy and procedures relating to confidentiality.                                                     |
|    |                                         | 1.2 | Suspicious or potentially dangerous electronic mail is identified and handled in accordance with organisational requirements and information/warnings/remedial action is conveyed to work team.           |
|    |                                         | 1.3 | Urgent mail is identified, prioritised and dealt with first in accordance with organisational requirements.                                                                                               |
|    |                                         | 1.4 | Returned email is dealt with in accordance with organisational policy and procedures.                                                                                                                     |
| 2. | Initiate and respond to electronic mail | 2.1 | Messages are prepared in accordance with organisational protocols for language, tone and format.                                                                                                          |
|    |                                         | 2.2 | Content, structure and recipient address/es for electronic mail are checked for accuracy and any attachments identified and prepared in accordance with organisational and service provider requirements. |
|    |                                         | 2.3 | Electronic mail is dispatched in accordance with organisational requirements within required timeframes.                                                                                                  |
| 3. | Maintain housekeeping system            | 3.1 | Electronic mail and/or attachments are copied or stored in accordance with organisational requirements.                                                                                                   |
|    |                                         | 3.2 | Electronic mailing lists are prepared and maintained in accordance with organisational requirements.                                                                                                      |
|    |                                         | 3.3 | Inboxes are emptied and electronic mail is archived or permanently deleted in accordance with organisational requirements.                                                                                |

**RANGE STATEMENTS**

All range statements must be assessed

1. Organisational protocols may include:
  - netiquette
  - net ethics
  - form of address
  - formality / informality of language, tone and structure
  - length of emails (i.e. short and to the point)
  - concise, relevant subject line
  - carbon copies or blind carbon copies
  - original message in the reply
  - sender's name and address
  - electronic signature
2. Suspicious or potentially dangerous electronic mail may include:
  - unsolicited mail containing viruses
  - spam (unsolicited commercial email or junk mail)
  - mail where sender is unknown and subject line is enticing and/or personal (e.g. urging the receiver to open immediately)
  - attachments
  - particular file extensions
3. Industry codes of practice and must include:
  - copyright laws
  - defamation laws
  - privacy legislation
  - intellectual property, confidentiality requirements
  - legal and regulatory policies affecting e-business
4. Dealing with returned (bounced) email may include:
  - checking email address
  - checking size of attachment/s
  - re-sending
  - sending message by other means e.g. facsimile, post
  - telephoning addressee
  - check with ITC Dept.
5. Legislation, codes and national standards relevant to the workplace may include:
  - award and enterprise agreements
  - national, requirements especially in regard to occupational health and safety
6. Mailing lists may include:
  - electronic address books
  - database or spreadsheet records
  - word-processing tables or data files
7. Checking for accuracy should include:
  - clarity of intended meaning
  - spelling
  - grammar
  - punctuation
8. Storage of electronic mail may include:
  - within electronic mail application software
  - specialised record keeping, spreadsheet or database software
  - paper-based filing system

9. Netiquette includes the following actions and attitudes:
- observing codes of conduct or codes of practice such as those used by discussion groups
  - remembering you're dealing with real people not computers
  - if you wouldn't do it in real life don't do it in cyberspace
  - adjusting to the style and tone of discussion groups
  - respect for other's time and bandwidth
  - looking good online (spelling, grammar, and something worth saying)
  - sharing expert knowledge
  - keeping flames under control (flaming is making personal attacks on others)
  - respecting other people's privacy
  - not abusing your power
  - being forgiving of other's mistakes
10. Preparing attachments may include:
- dealing with large attachments especially picture files
  - considering the limitations when sending large files
  - checking that file size will negotiate the service provider's gateway
  - separating large documents into a number of files
  - compressing files
11. Dispatching email may include:
- single receiver
  - group email
  - carbon copies (cc)
  - blind carbon copies
  - email bulletin board or discussion list

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

- what are the relevant legislation from all government agencies that affects business operation, especially in regard to occupational health and safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- what are the organisation's policies and procedures relating to electronic mail
- what are the service provider requirements especially with regard to email attachments
- what are the naming protocols for email addresses
- what are the electronic file handling (saving, copying, moving, deleting)
- what are the occupational safety and health requirements for working with computer technology
- what are the electronic mail system
- what are the relevant codes of practice or codes of conduct
- how to apply computer technology skills to use email
- how to compose and check accuracy of messages, and follow policies and procedures
- how to refer information to supervisors or peers especially in dealing with suspicious or potentially dangerous electronic mail
- how to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

- a. Integrated demonstration of all elements of competency and their performance criteria.
- b. Knowledge of the organisation's policies and procedures relating to electronic mail.
- c. Knowledge of service provider requirements.

### (2) Method of Assessment

- practical demonstration
- questioning interview
- workplace documents

### (3) Context of Assessment

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 of performance requirements in this unit should be undertaken in an actual workplace or simulated environment.

Assessment should reinforce the integration of the critical employability skill and the Business Services Common Competencies for the particular CVQ-J Level. Refer to the Critical Employment Skills at the end of this unit.

## BSBBAD0643B: Apply the principles of confidentiality and security

### Unit Descriptor:

This unit covers the use of ethical behaviour when dealing with sensitive and confidential information in an organization. It is essential that these behaviours govern all aspects of work in an organization.

### ELEMENTS

### PERFORMANCE CRITERIA

Candidates must be able to:

- |    |                                       |     |                                                                                                                                                                        |
|----|---------------------------------------|-----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Work within accepted codes of conduct | 1.1 | Work is reviewed and approved by the Supervisor who delegated the task/s.                                                                                              |
|    |                                       | 1.2 | Paperwork is kept up to date and reports on the progress of matter/s are forwarded to clients regularly according to instructions and relevant legislation.            |
|    |                                       | 1.3 | Conflict of interest or potential conflict of interest in any matter is promptly communicated to the person responsible for the department.                            |
|    |                                       | 1.4 | Clients and fellow workers are treated with respect.                                                                                                                   |
|    |                                       | 1.5 | Care is taken to behave with honesty and integrity at all times.                                                                                                       |
| 2. | Follow confidentiality procedures     | 2.1 | Information is assessed with regard to what is and what is not disclosable.                                                                                            |
|    |                                       | 2.2 | Discretion and judgement are used in all communications.                                                                                                               |
|    |                                       | 2.3 | Client-related matters are discussed only within the confines of the organization and with appropriate personnel.                                                      |
| 3. | Follow security procedures            | 3.1 | File related information is stored and secured appropriately.                                                                                                          |
|    |                                       | 3.2 | Discussions relating to client/customers matters are held in a private location.                                                                                       |
|    |                                       | 3.3 | All documents relating to a file are locked away securely after use according to a firm's policies and procedures.                                                     |
|    |                                       | 3.4 | All materials required by legislation to be stored for certain periods of time are clearly labelled and stored securely according to a firm's policies and procedures. |



## RANGE STATEMENTS

All range statements must be assessed.

1. Codes of conduct may include:

- maintaining confidentiality
- duty of care
- ethical behaviours
- privacy
- non-discriminatory practice
- conflict of interest
- use of company property
- compliance with reasonable direction

2. Non-disclosable information may include:

- names of clients or staff
- addresses of clients or staff
- telephone numbers of clients or staff
- information relating to a client's business matter
- firm's client database
- whereabouts of client
- financial information
- sensitive details about the firm itself
- passwords or security procedures
- nature of client's business matter
- fact that the client/customer has consulted the firm

3. Conflict of interest may exist where:

- an executive or support person has a personal, financial or other interest in the organization
- a legal practitioner and client are in business together
- a legal practitioner simultaneously represents two clients whose interests are adverse to one another
- the legal stance of one client is detrimental to the business activities of another client

4. Electronically stored information may be:

- on-line (e-mail or web)
- on computer hard-drive or floppy disc, jump drive
- on voice mail
- on audio-cassette
- compact discs
- dvd's

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. what are the policies and procedures relating to legislation e.g. Privacy Act
2. what are the context of legal conflict of interest
3. what are the legal terminology
4. what are the roles and responsibilities of internal and relevant external individuals/authorities
5. how to interpret and classify information;
6. apply judgement in terms of identifying potential conflict of interest
7. how to listen to clear sequenced instructions
8. how to use strategies to confirm, repair or clarify understanding of terms and context
9. how to abide by the firm's honesty and integrity
10. how to comply with statutory regulations concerning security of records and keeping clients up to date on file matter/s

## EVIDENCE GUIDE

This unit of competency will require evidence to be collected across a range of events, dealing with different issues and client matters, and over a period of time to ensure that situational variables are consistently achieved.

### (1) Critical Aspects of Evidence

- a. Where the level of confidentiality required in a situation is unclear; clarification is sought from the appropriate person before any information is divulged.
- b. The legal context of conflict of interest is understood.
- c. The organization's security procedures are understood and followed.
- d. Electronic and paper-based confidential information are handled according to a firm's policies and procedures.
- e. File-related matters stored electronically are secured when the operator is absent.
- f. Breaches of confidentiality, security and conduct (own and others) can be identified and standard resolutions to these breaches can be explained.
- g. Assistance and advice is provided to co-workers where appropriate.
- h. Evidence of knowledge of own scope of responsibility and roles and responsibilities of relevant others.

### (2) Method of Assessment

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- simulation
- role-play
- projects/assignments
- third party reports
- workplace documents

**(3) Context of Assessment**

Evidence of competency can be met in different situations, including:

- on the job assessment
- off the job assessment
- placement in an enterprise
- participation in an apprenticeship arrangement
- use of a Practice Firm or simulated work environment
- Recognition of Prior Learning, Recognition of Current Competencies (in skill areas where there has been no significant change to work practice in recent times).

## BSBCOR0382B: Display human relations skills

### Unit Descriptor:

This unit deals with working relationships and the provision of administrative and management support services to an organization/individual.

ELEMENTS	PERFORMANCE CRITERIA
Candidates must be able to:	
1. Interact with persons on the job	1.1 Courtesy and politeness are exercised at all times and requests are dealt with promptly and efficiently. 1.2 Information is transmitted promptly and accurately 1.3 Communication is conducted in a pleasant and effective manner. Non-verbal communication is recognized and reacted to in an appropriate manner. 1.4 Difficulties in working relationships are appropriately handled. 1.5 Confidential information is appropriately handled.
2. Exercise tactfulness, initiative, goodwill and reliability	2.1 Tact is exercised and objectivity maintained under all circumstances. 2.2 Initiative and good judgement are exercised at all times. 2.3 Goodwill and trust are promoted at all times. Reliability is exhibited in all activities. 2.4 Correct information regarding the organization and its operations is given at all times.
3. Exercise loyalty, honesty and confidence	3.1 Loyalty to co-workers, supervisors and the organization is exhibited/demonstrated at all times. 3.2 Self-confidence and assertiveness are appropriately portrayed and honesty is always practised. 3.3 Flexibility, positive attitudes and professionalism are displayed at all times in executing duties.

**RANGE STATEMENT**

All range statements must be assessed.

Competent performance of the criteria must be demonstrated in the following.

1. Legislation, codes and national standards relevant to the workplace which may include:
  - relevant legislation from all government agencies that affect 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
2. Communication:
  - oral
  - written
  - non-verbal
3. Difficulties in working relationships to include:
  - inequity in division of work
  - lack of cooperation
  - tardiness
  - impoliteness

Codes of conduct/behaviour:

  - an agreed (or decreed) set of rules relating to employee behaviour/conduct with other employees or customers
4. Working environment to include:
  - seating facilities such as swivel chairs, stools, benches and floorings such as carpeted floors, wooden floors, concrete floors, tiled floors
5. Persons to include:
  - peers
  - supervisors
  - clients/customers
  - general public

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the relevant legislation from all government agencies that affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
2. What are the organisational human resource policies and procedures
3. What are the quality assurance concepts
4. What are the counselling/discipline procedures
5. What are the the principles and techniques associated with:
  - accountability to head of team/supervisor
  - forms of bias/discrimination and how to deal with them
6. how to access and use workplace information
7. how to relate to people from a range of social, cultural ethnic backgrounds and physical and mental abilities
8. how to facilitate the participation of team members to ensure input from relevant groups and individuals for the specification of human resource services
9. how to ensure that human resource services meets client expectations/specifications (evaluation skills)

## EVIDENCE GUIDE

Competency is to be demonstrated by displaying human relations skills in at least three of the criteria listed within the range statement.

### (1) Critical Aspects of Evidence

It is essential that competence be observed in the following aspects:

- a. Compliance with occupational health and safety regulations applicable to workplace and human relations skills techniques.
- b. Indicate compliance with organizational policies and procedures.
- c. Demonstration of follow-through in relation to performance management issues to bring about a satisfactory conclusion.
- d. Follow a clear direction stipulated under the provision of human resource services with a structured quality assurance system.
- e. Interactively communicate with others to ensure safe and effective work procedures.
- f. Apply organizational quality procedures and processes within the context of displaying human relations skills.

**(2) Method of Assessment**

Competency should be assessed while work is being done under direct supervision with observation and may include some autonomy when working as part of a team.

Assessment may be by intermittent checking at the various stages of the job application in accordance with the performance criteria, or maybe at the completion of each process.

**(3) Context of Assessment**

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 Competency standards.

Assessment of performance requirements in this unit should be undertaken in an actual workplace or simulated environment

Assessment should reinforce the integration of the critical employability skills and the Business Services Common Competencies for the particular CVQ-J Level. Refer to the Critical Employability at the end of this unit.

**BSBBAD0392B: Transcribe and produce text from notes**

Unit Descriptor:

This unit covers taking notes from an oral or printed source and producing an accurate text from the notes.

**ELEMENTS****PERFORMANCE CRITERIA**

Candidates must be able to:

- |    |                      |     |                                                                                                                                   |
|----|----------------------|-----|-----------------------------------------------------------------------------------------------------------------------------------|
| 1. | Take notes           | 1.1 | Organisational requirements relating to style, presentation and storage of documents are identified prior to commencing the task. |
|    |                      | 1.2 | The purpose and requirements of text are clarified with the author.                                                               |
|    |                      | 1.3 | Notes are recorded with the required degree of accuracy.                                                                          |
|    |                      | 1.4 | Meaning and spelling of names or technical terms are clarified to ensure accuracy of the notes.                                   |
|    |                      | 1.5 | Notes are self-checked for accuracy.                                                                                              |
| 2. | Transcribe notes     | 2.1 | Text is produced from notes to the required degree of accuracy and reflects the intended meaning of the author.                   |
|    |                      | 2.2 | Text is produced within designated timelines.                                                                                     |
| 3. | Edit and revise text | 3.1 | Final text is self-checked for accuracy, grammar and syntax are appropriate for the intended purpose and audience of the text.    |
|    |                      | 3.2 | Text is revised, formatted, named, stored and printed in accordance with organisational and task requirements.                    |



## RANGE STATEMENT

All range statements must be assessed.

1. Legislation, codes and national standards relevant to the workplace which may include:
  - relevant legislation from all government agencies that affect 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
2. Notes may include those taken:
  - by telephone
  - in person
  - via teleconference
  - via videoconference
  - at meetings
  - for multiple speakers
  - from audiotapes
  - from printed matter
3. Required degree of accuracy of text may include:
  - correct spelling
  - correct grammar
  - intended meaning
  - correct use of technical vocabulary
4. Organisational requirements may include:
  - organisational format
  - number of copies
  - author's instructions
5. Purpose of text may include:
  - formal or informal letters
  - memos
  - reports
  - agendas
  - meeting notes
6. Required degree of accuracy may include:
  - capturing intended meaning of dictation
  - complete record (no omissions)
7. Self-checking notes for accuracy may include:
  - reading over notes for meaning
  - checking correlation between source and notes
  - inserting punctuation
  - clarifying names, addresses and specific spelling with information on file
8. Designated timelines for production of text may include:
  - timeline agreed with supervisor/person requiring text
  - organisation timeline, e.g. minutes of meeting/agenda
9. Self-checking of text may include:
  - checking spelling
  - checking grammar
  - checking intended meaning

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the relevant legislation from all government agencies that affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
2. What are the organisation's policy and procedure requirements
3. What are the formats and styles of workplace documents
4. What are the types of oral and printed sources
5. how to use correct spelling and grammar
6. how to clarify intended meaning with dictated source, proofread and edit own notes
7. how to use communication skills to predict words from context, interpret intonation and stress
8. how to apply retention skills
9. how to relate to people from a range of social, cultural, ethnic backgrounds and physical and mental abilities

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

- a. Demonstration of all elements of competency and their performance criteria.
- b. Use of conventional and other abbreviations and symbols.
- c. Final text meets identified purpose and requirements of author.

### (2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations, workplace documents and third party report. The candidate must have access to appropriate documentation and resources normally used in the workplace.

### (3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

**BSBBAD0522B: Process human resource documents and inquiries**

## Unit Descriptor:

This unit covers those administration functions, which are peculiar to the role of an HR specialist at this level. The unit begins the specialisation of administrative functions relating to the processing of documents and handling enquiries.

**ELEMENTS****PERFORMANCE CRITERIA**

Candidates must be able to:

- |    |                            |     |                                                                                                                                              |
|----|----------------------------|-----|----------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Process leave applications | 1.1 | Applications for leave are received, checked and sent to the relevant employee.                                                              |
|    |                            | 1.2 | Incomplete forms are returned to the applicant and assistance is given to complete the form.                                                 |
|    |                            | 1.3 | Applicants' leave entitlements are checked to ensure the requested leave is available.                                                       |
|    |                            | 1.4 | Applicants are advised if leave balance is sufficient to meet applicants' requests.                                                          |
|    |                            | 1.5 | Applicants are advised of the outcome of their leave application in accordance with organisational time frames and requirements.             |
|    |                            | 1.6 | Leave entitlements due to terminating employees are calculated in accordance with their contract of employment and legislative requirements. |
| 2. | Process job vacancies      | 2.1 | Job vacancies notified to HR are checked to ensure correct authorisations                                                                    |
|    |                            | 2.2 | Job vacancy notification is matched to the correct position description and person specification.                                            |
|    |                            | 2.3 | Advertisement for the position is arranged in accordance with organisational policy and time frames.                                         |
|    |                            | 2.4 | Inquiries regarding vacant positions are responded to in accordance with organisational procedures.                                          |
|    |                            | 2.5 | Applications for positions are checked to ensure compliance with organisational requirements and acknowledged.                               |
|    |                            | 2.6 | Applications meeting selection criteria are forwarded to the individuals responsible for selection.                                          |

- |    |                                          |                                                                                                                                         |                                                                                                                                                   |
|----|------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
|    | 2.7                                      | Interviews and other selection activities are scheduled and communicated to the affected parties.                                       |                                                                                                                                                   |
|    | 2.8                                      | Support is provided to the selection process in keeping with organisational policy.                                                     |                                                                                                                                                   |
|    | 2.9                                      | Successful and unsuccessful applicants are advised of the selection outcome in accordance with organisational policies and time frames. |                                                                                                                                                   |
| 3. | Provide information on personnel matters | 3.1                                                                                                                                     | Information needs of internal customers are identified and responded to in accordance with the HR communication plan.                             |
|    |                                          | 3.2                                                                                                                                     | All relevant individuals and groups are advised of changes to personnel policies and procedures as soon as practicable.                           |
|    |                                          | 3.3                                                                                                                                     | Inquiries from individuals and groups are received and researched where necessary.                                                                |
|    |                                          | 3.4                                                                                                                                     | Inquiries are responded to in accordance with organisational policies, procedures and performance standards.                                      |
|    |                                          | 3.5                                                                                                                                     | Employees and individuals/groups responsible for payroll preparation are advised of any variations to pay allowances or conditions of employment. |

## RANGE STATEMENT

All range statements must be assessed

- |    |                                                                                                                                                                                                                                                                              |    |                                                                                                                                                                    |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Leave may include but not limited to                                                                                                                                                                                                                                         | 2. | Selection criteria may include but not limited to:                                                                                                                 |
|    | <ul style="list-style-type: none"> <li>• annual leave</li> <li>• sick leave</li> <li>• long service leave</li> <li>• bereavement leave</li> <li>• study leave</li> <li>• leave without pay</li> <li>• jury service</li> <li>• military leave</li> <li>• maternity</li> </ul> |    | <ul style="list-style-type: none"> <li>• knowledge</li> <li>• skills</li> <li>• relevant experience</li> <li>• physical condition</li> <li>• appearance</li> </ul> |
| 3. | Relevant groups and individuals include but not limited to::                                                                                                                                                                                                                 |    |                                                                                                                                                                    |
|    | <ul style="list-style-type: none"> <li>• all those who have a role in the implementation of policies, procedures or decisions and/or are affected by their implementation</li> </ul>                                                                                         |    |                                                                                                                                                                    |

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the awards/agreements, organisational policies and legislation governing leave, recruitment, selection and orientation/induction processes, and other personnel matters
2. How to calculate leave entitlements due to terminating employees
3. How to arrange advertisement for vacant position
4. How to check applicants' leave entitlements
5. How to respond to inquiries regarding vacant positions
6. entitlements
7. How to prepare/compile up-to-date reports on leave status, job selection outcomes and inquiries

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- a. process documents within established time frames and in a manner which meets the quality assurance standards of the organisation
- b. check applicants' leave entitlements to ensure the requested leave is available advised applicants if leave balance is sufficient to meet applicants' requests
- c. calculate leave entitlements due to terminating employees in accordance with their contract of employment and legislative requirements
- d. match vacancy notification to the correct position description and specification
- e. arrange advertisement for vacant position in accordance with organisational policy and time frames
- f. respond to inquiries regarding vacant positions in accordance with organisational procedures
- g. schedule and communicate interviews and other selection activities to the affected parties.
- h. advise successful and unsuccessful applicants of the selection outcome in accordance with organisational policies and time frames
- i. identify and responded Information needs of internal customers to in accordance with the HR communication policy
- j. advise employees and individuals/groups responsible for payroll preparation of any variations to pay allowances or conditions of employment

### (2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report. The candidate must have access to appropriate documentation and resources normally used in the workplace.

### (3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge

## BSBBAD0632B: Maintain and issue stock items

### Unit Descriptor:

This unit covers keeping stock items such as stationery, other consumables and small items of equipment, and issuing them on request. It includes ordering and checking stock from external or internal sources and does not include negotiating terms of supply.

### ELEMENTS

### PERFORMANCE CRITERIA

Candidates must be able to:

- |    |                              |     |                                                                                                                  |
|----|------------------------------|-----|------------------------------------------------------------------------------------------------------------------|
| 1. | Maintain stock levels        | 1.1 | Stocks are maintained to the levels required or established.                                                     |
|    |                              | 1.2 | Stocks are handled safely and stored securely according to organization's procedures.                            |
|    |                              | 1.3 | Stock conditions are maintained in keeping with manufacturer's requirements and organization's policy.           |
| 2. | Carry out stocktaking        | 2.1 | Stocktaking is conducted as instructed.                                                                          |
|    |                              | 2.2 | Problems identified are reported promptly to relevant persons.                                                   |
|    |                              | 2.3 | Records are documented accurately.                                                                               |
| 3. | Make and follow-up orders    | 3.1 | Stocks are ordered from suppliers and all necessary documentation completed.                                     |
|    |                              | 3.2 | Appropriate authorization for order is obtained.                                                                 |
|    |                              | 3.3 | Orders are confirmed with supplier and agreed delivery time is set.                                              |
| 4. | Check and record deliveries  | 4.1 | Incoming deliveries are checked against orders and problems identified are reported promptly to relevant person. |
|    |                              | 4.2 | Accurate records are kept of actual stocks received.                                                             |
| 5. | Issue stock items on request | 5.1 | Stock items are issued in accordance with organisation procedures.                                               |
|    |                              | 5.2 | Accurate, legible and updated records are kept of stocks issued.                                                 |

- |    |                        |                                                                                                                                                              |
|----|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | 5.3                    | Unwanted or obsolete stocks are disposed of in accordance with organization's procedures and legal requirements.                                             |
|    | 5.4                    | Opportunity is taken to identify and recommend ways to improve the receiving and issuing of stock                                                            |
| 6. | Maintain stock records |                                                                                                                                                              |
|    | 6.1                    | Accurate, legible and updated records of stock delivered, received and held and dispose of are maintained in accordance with organization policy procedures. |
|    | 6.2                    | Incorrect records are adjusted according to established procedures.                                                                                          |

## RANGE STATEMENT

All range statements must be assessed

- |                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                                                                                                |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>1. Stock handling problems may include but not limited:</p> <ul style="list-style-type: none"> <li>• types of problems linked with deliveries</li> <li>• types of problems linked with issuing of stock</li> <li>• procedures to handle, correct or report problems</li> <li>• identification of any differences in ordering procedures for external and internal supplier(s)</li> </ul> | <p>2. Sources of supply may include but not limited::</p> <ul style="list-style-type: none"> <li>• internal supply sources</li> <li>• external supply sources</li> </ul>                                                                                       |
| <p>3. Demand levels source may include but not limited:</p> <ul style="list-style-type: none"> <li>• current level of demand for stock</li> <li>• factors affecting future levels of demand</li> <li>• stock level maintained</li> <li>• reorder level and reorder quantity</li> </ul>                                                                                                      | <p>6. Record keeping methods may involve may include but not limited:</p> <ul style="list-style-type: none"> <li>• methods of maintaining and updating records</li> <li>• stocktaking periods</li> <li>• importance of accurate and legible records</li> </ul> |
| <p>4. Storage and disposal may include but not limited:</p> <ul style="list-style-type: none"> <li>• methods of storage</li> <li>• security and safety procedures</li> <li>• handling procedures</li> <li>• disposal procedures and policy</li> <li>• correct methods of disposal of stock items</li> </ul>                                                                                 | <p>7. Legal requirement may include but not limited:</p> <ul style="list-style-type: none"> <li>• environment regulations for disposal</li> <li>• safety requirements for disposal and retention</li> </ul>                                                    |

- |                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                          |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>5. Issuing of stock may include but not limited:</p> <ul style="list-style-type: none"> <li>• process for issuing to individual team(s) or department; external person or department</li> <li>• receipts required for items issued (where applicable)</li> <li>• checking source of origin of the principal documents identified</li> </ul> | <p>8. Completing documentation may include but not limited:</p> <ul style="list-style-type: none"> <li>• purchase requisition</li> <li>• delivery invoice</li> <li>• stock cards</li> <li>• inventory records</li> </ul> |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the reorder levels for stocks
2. What are the requirements for ordering, storing, taking delivery, issuing and disposing of stocks
3. What are the problems associated with deliveries and stock items
4. how to handle and correct problems
5. What are the methods of maintaining up-to-date, accurate and legible records
6. What are the for stock-taking types of documents used and their importance
7. What are the differences between trade and cash discounts
8. What are stock control procedures
9. What are stock control cards
10. What are the storage facilities for different kinds of stocks
11. What are the meanings of terms:
12. First-in-First-Out
13. Last-in-Last Out (LIFO)
14. How to order and check stock from external and internal suppliers
15. How to maintain stock records
16. How to maintain established stock levels
17. How to calculate reorder levels/or quantity
18. How to carry out stocktaking
19. How to dispose unwanted or obsolete stocks
20. How to complete requisition and stock control cards
21. How to use computer-based stock control software where applicable

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- a. maintain stock levels according to establishment requirement
- b. follow stocktaking procedures
- c. order stock and correct completion of all necessary documentation
- d. handle, store and dispose stock items safely
- e. issue stock according to procedure
- f. supplier and delivery time-line are agreed on
- g. keep accurate record of stock



**(2) Method of Assessment**

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report. The candidate must have access to procedures for handling of stocks, documentation used including requisition forms, stock cards, purchase order forms, receptionist books, order forms, stock control software (where applicable or appropriate), procedures for stocktaking and reporting, stock items (where applicable)

**(3) Context of Assessment**

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

## BSBBAD0642B: Process accounts payable and receivable

### Unit Descriptor:

This unit covers maintenance of accounts payable and accounts receivable records, processing of payments to creditors, and handling overdue accounts receivable.

<b>ELEMENTS</b>		<b>PERFORMANCE CRITERIA</b>	
Candidates must be able to:			
1.	Maintain financial journal systems	1.1	Source documents are checked for accuracy and authorisation.
		1.2	Errors and discrepancies in source documents are referred for resolution in accordance with organisational policy and procedures.
		1.3	Transactions are entered into the cash and credit journal system in accordance with organisational policy and procedures and accounting requirements.
		1.4	Credit journals are totalled in accordance with organisational policy and procedures.
2.	Prepare bank reconciliations	2.1	Cash journals are checked against bank statements to identify differences.
		2.2	Cash journals are updated with relevant data from bank statement.
		2.3	Discrepancies are identified and referred to the appropriate staff member/agency.
3.	Maintain accounts payable and accounts receivable systems	3.1	Transactions are entered into individual accounts payable and accounts receivable in accordance with organisational policy and procedures and accounting requirements.
		3.2	Schedules of accounts payable and accounts receivable are prepared for reconciliation purposes in accordance with organisational requirements.
		3.3	Schedules of accounts payable and accounts receivable are reconciled with journal data or general ledger in accordance with organisational requirements.

- |    |                                            |     |                                                                                                                                                                        |
|----|--------------------------------------------|-----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 4. | Process payments for accounts payable      | 4.1 | Accounts payable statements are reconciled with accounting records in accordance with organisational policy and procedures.                                            |
|    |                                            | 4.2 | Payment documentation is checked for accuracy of information and discrepancies and errors rectified in accordance with organisational requirements.                    |
| 5. | Prepare statements for accounts receivable | 5.1 | Discrepancies are rectified and statements despatched within designated timelines.                                                                                     |
|    |                                            | 5.2 | Accounts receivable statements are produced and checked for accuracy of content in accordance with organisational policy and procedures.                               |
| 6. | Follow up outstanding accounts             | 6.1 | Accounts receivable ledger system is maintained in accordance with organisational requirements to reflect the current credit situation.                                |
|    |                                            | 6.2 | Aged analysis of accounts receivable is conducted to identify outstanding accounts and determine collection procedures in accordance with organisational requirements. |
|    |                                            | 6.3 | Outstanding accounts are reported or followed up in accordance with organisational policy and procedures.                                                              |
|    |                                            | 6.4 | Credit terms are monitored and reviewed in accordance with credit policy and procedures.                                                                               |

## RANGE STATEMENT

- |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                              |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Transactions may include but not limited to:                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 2. Source documents may include but not limited to:                                                                                                                                                                                          |
| <ul style="list-style-type: none"> <li>• credit purchases</li> <li>• credit sales</li> <li>• returns</li> <li>• day-to-day expenses</li> <li>• purchases paid by cheque</li> <li>• withdrawal of cash by owner</li> <li>• payments to creditors</li> <li>• interest charges and bank fees</li> <li>• capital contributions in cash by owner</li> <li>• payments received by debtors</li> <li>• cash sales</li> <li>• cash purchases</li> <li>• commission</li> <li>• interest revenue</li> </ul> | <ul style="list-style-type: none"> <li>• invoices received</li> <li>• tax invoices issued</li> <li>• credit notes received</li> <li>• credit notes issued</li> <li>• adjustment notes</li> <li>• cheque stubs</li> <li>• receipts</li> </ul> |

3. Journals may include but not limited to:
  - purchases journal
  - purchases returns journal
  - cash payments journal
  - sales journal
  - sales returns journal
  - cash receipts journal
5. Journal data may include but not limited to:
  - purchases journal total
  - purchases returns journal total
  - accounts payable data from cash payments journal
  - sales journal total
  - sales returns journal total
  - accounts receivable data from cash receipts journal
7. Credit terms may include but not limited to:
  - cash on delivery
  - cancellation of agreed credit arrangements
  - arrangements for settlement
9. Accounts receivable statements may include but not limited to:
  - manual system
  - computerised system
  - name and address of supplier
  - name and address of client/accounts receivable
  - month to which statement is applicable
  - opening balance if applicable
  - information about any sales, sales returns, credit, forward orders and payments which have occurred throughout the month
  - final balance with overdue details if appropriate
  - any payments received allocated on an invoice by invoice basis
  - discount policy
4. Discrepancies may include but not limited to:
  - bank charges
  - interest
  - dishonoured cheques
  - direct payments
  - direct deposits
6. Accounts payable and receivable systems may include but not limited to:
  - accounts payable subsidiary ledger
  - accounts payable schedule
  - accounts receivable subsidiary ledger
  - accounts receivable schedule
8. Systems may include:
  - manual
  - computerised
10. Checking of payment documentation may include but not limited to:
  - attachment of supporting invoices, statements
  - calculation of discount
  - cheque data
  - remittance advice data

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the source documents and the information contained within source documents
2. What is a ledger
3. What are credit terms
4. What are schedules of accounts
5. What are accounts payable and accounts receivable
6. How to enter transactions into the cash and credit journal system
7. How to reconcile cash journals against bank statements
8. How to enter transactions into individual accounts payable
9. How to prepare schedules of accounts payable and accounts receivable
10. How to reconcile schedules of accounts payable and accounts receivable with journal data or general ledger
11. Accounts receivable ledger system is maintained
12. How to conduct aged analysis of accounts receivable to identify outstanding accounts and determine collection procedures

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- a. conduct aged analysis of accounts receivable identify outstanding accounts and determine collection procedures
- b. check payment documentation for accuracy of information and discrepancies and rectify errors
- c. reconcile accounts payable and receivable statements for reconciliation with accounting records
- d. prepare schedules of accounts payable and accounts receivable
- e. reconcile schedules of accounts payable and accounts receivable with journal data or general ledger
- f. identify discrepancies
- g. enter data into journal and subsidiary ledger system
- h. reconcile subsidiary ledger system with journal or general ledger data
- i. trace errors systematic

### (2) Method of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. The candidate have access to appropriate documentation and resources normally used in the workplace, which may including workplace reference materials such procedural manuals and company policy, cash journals, credit journals, accounts payable and accounts receivable subsidiary ledgers, calculator, computer equipment and relevant software

**(3) Context of Assessment**

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report

## BSBBAD0652B: Process financial information

### Unit Descriptor:

This unit covers the processing information and producing financial documents including invoices, purchases orders expenses claims, petty cash requisitions, pay advices and standards reports.

### ELEMENTS

### PERFORMANCE CRITERIA

Candidates must be able to:

- |    |                                                  |     |                                                                                                                                  |
|----|--------------------------------------------------|-----|----------------------------------------------------------------------------------------------------------------------------------|
| 1. | Enter financial information into computer system | 1.1 | Information is entered accurately from source documents into the correct file of computer system.                                |
|    |                                                  | 1.2 | Clarification and or guidance is sought from relevant persons where source documents are incomplete unclear and or unauthorized. |
|    |                                                  | 1.3 | Relevant codes are added according to organisation procedures.                                                                   |
|    |                                                  | 1.4 | Source documents are filed in accordance with organization's procedures.                                                         |
|    |                                                  | 1.5 | Information in the complete system is modified or deleted only as instructed.                                                    |
|    |                                                  | 1.6 | Security and confidentiality of information is modified at all times.                                                            |
| 2. | Produce standards financial document/reports     | 2.1 | All relevant information needed to generate report is confirmed as entered accurately into computer system.                      |
|    |                                                  | 2.2 | Financial document/reports are printed in required format and in accordance with organisation's procedures.                      |
|    |                                                  | 2.3 | Financial document/reports printed are checked for correctness and includes all required information                             |
|    |                                                  | 2.4 | Documents/reports are submitted only to the relevant persons.                                                                    |
|    |                                                  | 2.5 | Security and confidentiality of information is maintained at all times.                                                          |

- |    |                                       |     |                                                                                    |
|----|---------------------------------------|-----|------------------------------------------------------------------------------------|
| 3. | Produce statistical/graphical reports | 3.1 | Financial information is accurately extracted from source document.                |
|    |                                       | 3.2 | Information is interpreted correctly and is presented in suitable graphical forms. |
|    |                                       | 3.3 | Reports produced where appropriate includes simple statistical data.               |

## RANGE STATEMENT

All range statements must be assessed

- |    |                                                                                                                                                                                                                                |    |                                                                                                                                                                                                                                                                                                                |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Parts of organisations computer system to include:                                                                                                                                                                             | 6. | Input of information to include the following types:                                                                                                                                                                                                                                                           |
|    | <ul style="list-style-type: none"> <li>• networks</li> <li>• databases</li> <li>• softwares</li> <li>• intranet</li> <li>• hardware</li> </ul>                                                                                 |    | <ul style="list-style-type: none"> <li>• words</li> <li>• numbers</li> <li>• information which need to be coded</li> </ul>                                                                                                                                                                                     |
| 2. | Confidentiality aspects may include:                                                                                                                                                                                           | 7. | Relevant codes to include:                                                                                                                                                                                                                                                                                     |
|    | <ul style="list-style-type: none"> <li>• persons authorized to receive information/reports</li> <li>• disclosure policy</li> <li>• use of source documents</li> <li>• sharing classified information</li> </ul>                |    | <ul style="list-style-type: none"> <li>• unique reference codes</li> <li>• accounting codes</li> <li>• other approved codes</li> </ul>                                                                                                                                                                         |
| 3. | Security procedures may include:                                                                                                                                                                                               | 8. | Relevant persons to include:                                                                                                                                                                                                                                                                                   |
|    | <ul style="list-style-type: none"> <li>• printing of reports</li> <li>• storing of source documents</li> <li>• storage of reports</li> <li>• access to and use of computer system</li> <li>• operational procedures</li> </ul> |    | <ul style="list-style-type: none"> <li>• supervisors</li> <li>• manager</li> <li>• author of source documents</li> </ul>                                                                                                                                                                                       |
| 4. | Simple statistical data                                                                                                                                                                                                        | 9. | Organisation's procedures to include:                                                                                                                                                                                                                                                                          |
|    | <ul style="list-style-type: none"> <li>• mean</li> <li>• mode</li> <li>• average</li> </ul>                                                                                                                                    |    | <ul style="list-style-type: none"> <li>• processing financial information</li> <li>• handling confidential information</li> <li>• security procedures for handling and storage of documents</li> <li>• using parts of computer systems</li> <li>• coding financial information authorization levels</li> </ul> |



5. Source documents to include:

- receipts and invoices
- purchase requisition and orders
- accounting records/statements
- payments records
- vouchers
- time sheets
- purchase slips
- deposit books/slips payment rates
- delivery dockets
- credit notes
- cheques
- petty cash vouchers
- petty cash books
- bank statements

### UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the information required for financial documents/reports
2. What are the types of graphs and charts and their importance
3. How to process financial information using relevant software of organisation's computer system
4. How to input types of information to include:
  - invoices
  - purchase orders
  - expense claims
  - petty cash requisitions
  - pay advices
  - standard reports
5. How to interpret and re-present information in suitable form to include: (computer generated)
  - tables
  - graphs
  - charts

### EVIDENCE GUIDE

**(1) Critical Aspects of Evidence**

Evidence should include a demonstrated ability to:

- a. use of relevant software of organisation's computer system
- b. extract financial information from source document
- c. seek clarification and or guidance from relevant persons where source documents are incomplete, unclear and or unauthorized
- d. produce reports which include simple statistical data
- e. check financial document/reports for correctness

**(2) Method of Assessment**

- Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations and third party report. Candidate must have access to available source documents and computer system.

**(3) Context of Assessment**

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

**BSBBAD0422B: Follow OHS policies and procedures in medical office****Unit Descriptor:**

This unit covers the procedures and policies of office Occupational Health & Safety (OHS), identifying risks and hazards, responding to emergencies and maintaining a safe workplace.

**ELEMENTS****PERFORMANCE CRITERIA**

Candidates must be able to:

- |    |                                                                                      |     |                                                                                                                                                                    |
|----|--------------------------------------------------------------------------------------|-----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. | Demonstrate familiarity with office practice manual and office policy and procedures | 1.1 | Roles and responsibilities of persons employed in a medical office are identified and understood.                                                                  |
|    |                                                                                      | 1.2 | Emergency procedures as outlined in practice manual are identified and understood.                                                                                 |
|    |                                                                                      | 1.3 | Policies and procedures in place to protect employees, visitors and patients from accidents in the medical office are identified and understood.                   |
|    |                                                                                      | 1.4 | The importance of following the practice manual and documenting all activities, actions and outcomes immediately after an occurrence is identified and understood. |
|    |                                                                                      | 1.5 | Assistance is requested and sought where appropriate.                                                                                                              |
|    |                                                                                      | 1.6 | Any uncertainties or irregularities are referred to the appropriate person for resolution.                                                                         |
| 2. | Identify and respond to an emergency                                                 | 2.1 | Hazards and emergency situations are identified and responded to according to office policies and procedures.                                                      |
|    |                                                                                      | 2.2 | Patients, visitors and colleagues requiring urgent medical attention are attended to according to office policies and procedures.                                  |
|    |                                                                                      | 2.3 | Appropriate person is contacted promptly and informed of the emergency situation.                                                                                  |
|    |                                                                                      | 2.4 | External authorities are contacted where appropriate and according to office policies and procedures.                                                              |
|    |                                                                                      | 2.5 | Actions, activities and outcomes are recorded according to legislative requirements and office policies and procedures.                                            |

- |    |                           |     |                                                                                                                                                          |
|----|---------------------------|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| 3. | Maintain a safe workplace | 3.1 | Potential Occupational Health and Safety OHS risks and hazards are identified and rectified by self or referred to appropriate person for rectification. |
|    |                           | 3.2 | Any spillages or breakages are cleaned up promptly and according to the office policies and procedures.                                                  |
|    |                           | 3.3 | Refuse, bodily fluids and waste and potential sources of infection are cleaned up promptly and according to the office policies and procedures           |
|    |                           | 3.4 | Dangerous products are stored according to office and manufacturer's instructions.                                                                       |
|    |                           | 3.5 | Cleaning apparatus are maintained and used according to office and manufacturer's instructions.                                                          |
|    |                           | 3.6 | The reception area and work equipment are kept clean and tidy.                                                                                           |
|    |                           | 3.7 | Personal hygiene is maintained.                                                                                                                          |

## RANGE STATEMENT

All range statements must be assessed

- |                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                              |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Emergency procedures may include:                                                                                                                                                                    | 2. Documenting activities, action and outcomes may include:                                                                                                                                                                                                                  |
| <ul style="list-style-type: none"><li>• fire drills</li><li>• evacuation</li><li>• dealing with medical emergencies including psychiatric emergencies</li><li>• administering basic first aid</li></ul> | <ul style="list-style-type: none"><li>• preparing reports</li><li>• recording incidents according to the enterprise's policies and procedures (eg. completing standard forms)</li><li>• documenting sterilisation procedures</li><li>• documenting vaccine storage</li></ul> |

3. Emergencies, risks and hazards may include:
  - drug hold-ups, robbery
  - fire
  - bomb threats
  - medical emergencies (eg. falls, bleeding, seizures, fainting, collapses, panic attack, psychosis)
  - injuries (eg. needle stick)
  - spread of infection
  - spillage
  - breakage
  - exposure to blood samples
  - incorrect storage of chemicals
  - lack of personal hygiene
  - inadequate clothing or safety equipment
  - exposure to hazardous material
  - unprotected trailing cord
4. Appropriate person may include:
  - supervisor
  - OHS officer
  - senior medical administrator
  - doctor
5. External authorities may include:
  - Police
  - Ambulance
  - Fire Brigade
6. Dangerous products may include:
  - blood
  - vaccines
  - specimens
  - drugs
  - chemicals
  - sharps (eg. needles, scalpel blades )
7. Potential sources of infection may include:
  - unsterilised/poorly sterilised equipment and work surfaces
  - unwashed hands
  - spillages
  - breakages
  - patients with colds, flu and other infectious diseases
  - used dressings, bandages and equipment
  - sharps (eg. needles, scalpel blades)
  - contaminated waste
8. Maintaining and using cleaning apparatus may include:
  - maintaining stocks of cleaning equipment (eg. disposable gloves, liquid repellent aprons, disinfectant)
  - correct disposal of spilled substances, dangerous products, 'sharps' and waste
  - sterilising and/or disposing of cleaning equipment
  - using appropriate cleaning equipment to clean spillages and breakages only
9. Maintaining personal hygiene may include:
  - wearing protective clothing, protective eye wear when in contact with body fluids or chemicals that may splash
  - washing hands
  - covering open wounds or abrasions on own body
  - wearing gloves when appropriate
  - not attending work if ill
  - immunisations appropriate for the setting

10. Keeping reception area and work equipment clean and tidy may include:
- keeping access routes clear and free of clutter
  - attending to spillages and breakages promptly
  - preparing examination rooms for patients
  - tidying brochures, magazines and other display materials
  - processing patient notes, records, files, reports and results promptly
  - placing files in appropriate trays/locations
  - cleaning and sanitising floor and bench surfaces
  - cleaning and tidying toilets and lunch room
  - laundering linen
11. Policies and procedures may include:
- emergency procedures including the calling of ambulances
  - office practice manual
  - OHS policies
  - Materials Safety Data Sheets (MSDSs)
  - administering first aid and CPR
  - re-prioritisation of work
  - security, confidentiality and privacy procedures
  - recording information
  - cleanliness and hygiene
  - information specific to the enterprise
  - abiding by local government legislation
  - following instructions
  - infection control including cleaning and sterilisation of instruments
  - Code of Practice for the Management of Health Information in General Practice
  - Entry Standards for General Practices
  - Sterilisation/Disinfection Guidelines for General Practice
  - Ministry of Health guidelines

## UNDERPINNING KNOWLEDGE AND SKILLS

Candidates must know and understand:

1. What are the office practice manual
2. What are the procedures manual
3. What are the relevant government legislation
4. What are the own and others' responsibilities
5. What are the appropriate forms and recording requirements
6. What are the appropriate cleaning and sterilisation techniques and apparatus
7. What are the appropriate external agencies
8. What are the potential hazards and risks
9. What are the dangerous products
10. What are the organisation's emergency measures
11. What are the practical nursing
12. What are the cultural/religious differences
13. How to interpret set procedures and policies;
14. How to understand the meaning of occupational health and safety signs;
15. How to interpret instructions which combine pictorial and written information
16. How to relay information, use appropriate medical terminology, sentence structures
17. How to interact with patients and others in an appropriate manner
18. How to follow routine oral and written sequenced instructions
19. How to listen to short, explicit instructions to learn new procedures
20. How to explain routine procedures to others, eg. workplace safety procedures
21. How to participate in workplace meetings by listening for specific information and contributes as appropriate
22. How to display calm efficiency in the face of emergencies

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

Practice manual is adhered to:

- a. Emergency situations are responded to appropriately.
- b. Emergencies are referred to correct internal and external agencies as appropriate.
- c. Hazards and risks are correctly identified and responded to accordingly.
- d. Correct Fire Plan and evacuation procedures are known and demonstrated.
- e. Patients who require urgent medical assistance are attended to promptly and appropriately.
- f. Measures are taken to reduce risk of infection.
- g. Spillages and breakages are attended to promptly and appropriately.
- h. Chemicals and other dangerous substances are handled correctly.
- i. Safety equipment is maintained and used.
- j. Reception and other areas are cleaned and maintained.
- k. Work surfaces and equipment are cleaned and/or sterilised to required standards.
- l. Personal hygiene is maintained.
- m. An understanding of the limit of own responsibility is demonstrated.
- n. Uncertainties and irregularities are reported to appropriate person for resolution.
- o. Confidentiality, security and privacy of information is maintained.

### (2) Method of Assessment

Assessors should gather a range of evidence that is valid, sufficient, current and authentic. Evidence can be gathered through a variety of ways including: direct observation; oral/written questioning and practical demonstrations, simulation, role-play and third party report.

### (3) Context of Assessment

This unit may be assessed on or off-the-job. Assessment should include practical demonstration either in the workplace or through a simulation. This should be supported by a range of methods to assess underpinning knowledge.

# GLOSSARY OF TERMS

## ***Occupational Standards***

Occupational Standards of competence are industry-determined specifications of performance, which describe the knowledge, skills and attitudes required by a worker in the performance of a particular role in the workplace. They specify what a person should know and do in order to carry out the functions of a particular job in the work environment. They are the building blocks for all activities in a competency-based training and certification system. An Occupational Standard is made up of a qualification plan, a unit title, elements, performance criteria, range statements, underpinning knowledge and skills and evidence guide.

***Qualification Plan*** – The Qualification Plan identifies the Mandatory units which are those units that are necessary to deem a candidate competent in the occupational area and provide flexibility in different work environments. It also contains the Title and Level of the qualification to be awarded.

***Unit Title*** - The unit title is a succinct statement of the outcome of the unit of competency. It reflects the major activities or functions of an individual's work as well as the discrete units of work.

***Unit Descriptor*** - The unit descriptor communicates the content of the unit of competency and the skill area it addresses.

***Elements*** - These are the basic building blocks of the unit of competency. They describe the tasks in which competence should be demonstrated in order to carry out the specific function.

***Performance Criteria*** - These are the descriptions of the outcomes of performance required for successful achievement of an element. They specify the required performance in relevant tasks, roles, skills and applied knowledge that enables competent performance.

***Range Statement*** - This describes the essential operating conditions that should be present in training and assessment, depending on the work situation, needs of the candidate, accessibility of the item and local industry contexts. It lists the parameters in which candidates must demonstrate their competence.

***Underpinning Knowledge and Skills*** – The knowledge identifies what a person needs to know to perform the work in an informed and effective manner. The skills describe the application of knowledge to situations where understanding is converted into a workplace outcome.



**Evidence Guide** - The Evidence Guide is critical in assessment as it provides information to Training Providers and Assessors about how the described competency should be demonstrated. It provides a range of evidence for the Assessor to make a determination of competence and defines the assessment context. The Evidence Guide describes:

- Conditions under which competency must be assessed including variables such as the assessment environment or necessary equipment
- Suitable methodologies for conducting assessment including the potential for workplace simulation
- Resource implications, for example access to particular equipment, infrastructure or situations
- How consistency in performance must be assessed over time, various contexts and with a range of evidence

### **Level 1 – Directly supervised worker**

Recognizes competence in a range of varied work activities performed in a variety of contexts. Most work activities are simple and routine. Collaboration with others through work groups or teams may often be a requirement. Substantial supervision is required especially during the early months evolving into more autonomy with time.

### **Level 2 – Supervised skilled worker**

Recognizes competence in a broad range of diverse work activities performed in a variety of contexts. Some of these may be complex and non-routine and involve some responsibility and autonomy. Collaboration with others through work groups or teams and guidance of others may be required.

### **Level 3 – Independent/autonomous skilled worker**

Recognizes competence in a broad range of complex, technical or professional work activities performed in a wide variety of contexts, with a substantial degree of personal responsibility and autonomy. Responsibility for the work of others and the allocation of resources are often a requirement. The individual is capable of self-directed application, exhibits problem solving, planning, designing and supervisory capabilities.

### **Level 4 – Supervisory specialist worker**

Recognizes competence involving the application of a range of fundamental principles and complex techniques across a wide and unpredictable variety of contexts. Requires very substantial personal autonomy and often significant responsibility for the work of others, the allocation of resources, as well as personal accountability for analysis, diagnosis, design, planning, execution and evaluation.

## **Level 5 – Managerial professional worker**

Recognizes the ability to exercise personal professional responsibility for the design, development or improvement of a product, process, system or service. Recognizes technical and management competencies at the highest level and includes those who have occupied positions of the highest responsibility and made outstanding contribution to the promotion and practice of their occupation.