Competency Standards for Caribbean Vocational Qualifications (CVQ)

CCBSB10103   Level I General Office Administration (Office Clerk)
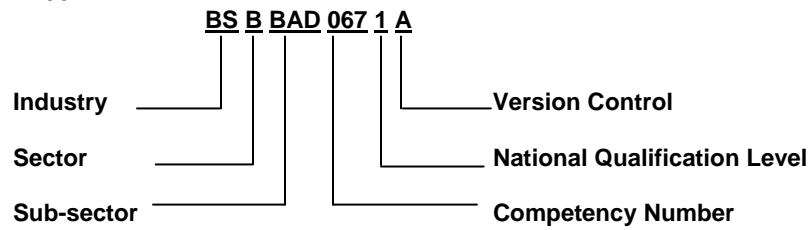
Unit Code	Unit Title	Mandatory/Elective	Hours
BSBCOR0011A	Prepare for work	Mandatory	10
BSBCOR0591A	Apply basic communication skills	Mandatory	10
BSBCOR0171A	Deliver quality customer service	Mandatory	15
BSBCOR0161A	Handle telephone calls	Mandatory	25
BSBBAD0081A	Develop keyboarding skills	Mandatory	20
BSBBAD0671A	Type and copy routine documents	Mandatory	15
BSBCOR0091A	Receive visitors	Mandatory	20
BSBBAD0681A	Locate and store files in a paper-based system	Mandatory	20
BSBCOR0071A	Operate a personal computer	Mandatory	30
BSBBAD0031A	Use business equipment	Mandatory	20
BSBCOR0041A	Develop professionalism	Mandatory	30
BSBCOR0101A	Work effectively in a business environment	Mandatory	20
BSBCOR0201A	Participate in workplace safety procedures	Mandatory	20
BSBFIN0721A	Prepare routine financial documents	Elective	15
BSBBAD0181A	Provide information to clients	Elective	20
FNBFIN0701A	Prepare and bank financial receipts	Elective	25
ITCCOR0081A	Sell products and services	Elective	30
BSSREO0131A	Perform stock control procedures	Elective	15
BSBBAD0711A	Organise the copying and collating of documents	Elective	10
BSBBAD0212A	Process mail	Elective	30
BSBBAD0612A	Perform cashiering	Elective	30
BSBSBM0012A	Craft personal entrepreneurial strategy	Elective	50
BSBBAD0732A	Record, store and supply information using a paper-based filing system	Elective	20
BSBBAD0742A	Reproduce, present and distribute complex documents	Elective	20
BSBBAD0632A	Maintain and issue stock items	Elective	30
BSBBAD0762A	Co-ordinate mail service	Elective	25
BSSREO0142A	Maintain stock control	Elective	20
BSBCOR0382A	Display human relations skills	Elective	10

To obtain this qualification, all Mandatory competencies plus a minimum of two level one elective, three level two electives.

Nominal Training Hours (Institutional Delivery) include total hours of Mandatory competencies and Electives selected.

Legend to Unit Code

Example: BSBBAD0671A

BS B BAD 067 1 A

Industry ———————

Sector ———————

Sub-sector ———————

Version Control

National Qualification Level

Competency Number

KEY: Man – Mandatory; BAD – Business Administration; SBM – Small Business Management; FIN – Finance; BSB – Business Services (Business); ITC Information Technology Communication); FNB – Financial Services (Business)

BSBCOR0011A: Prepare for work

Competency Descriptor: This unit covers the skills and knowledge required to prepare an individual to perform effectively in a work environment. It includes identifying the rights and responsibilities of employees and employers and assisting in the business while under direct supervision.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Identify organisational/work requirements	1.1	Work requirements and responsibilities are identified with advice from appropriate persons.
	1.2	Roles and responsibilities of colleagues and immediate supervisors are identified.
	1.3	Employee's/employer's rights are identified and knowledge applied where appropriate.
	1.4	Legal responsibilities and any relevant organisational goals and objectives are identified and applied where appropriate.
	1.5	Behaviour that contributes to a safe work environment is identified and followed.
2. Work in a team	2.1	Courteous and helpful manner is displayed at all times.
	2.2	Allocated tasks are completed as required.
	2.3	Assistance is sought when difficulties arise.
	2.4	Questioning is used to clarify instructions or responsibilities.
	2.5	Non-discriminatory attitude is displayed.
3. Develop effective work habits	3.1	Work and personal priorities are identified and a balance achieved between competing priorities.
	3.2	Time management strategies are applied to work duties.
	3.3	Appropriate dress and behaviour are observed in the workplace.
4. Demonstrate proper grooming habits	4.1	There is graceful bearing in walking, sitting and standing. Posture and movement of body parts is properly harmonized, according to physical capacity.
	4.2	Unpleasant body odour is absent, also bad breath. Teeth show evidence of proper dental care.
	4.3	Hair is clean; hairstyle is suitable for the workplace and is maintained in a neat manner.

4.4   Hands are clean; nails are trim, neat and free of dirt.

4.5   Clothing is neatly constructed, properly finished, fits well and coordinates attractively.

4.6   Clothing has the right tone for the office and is neither too dressy, too casual nor too revealing.

4.7   Accessories are used tastefully and are not overpowering or detracting.

RANGE STATEMENT

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

Legislation, codes and national standards relevant to the workplace which may include:

- relevant legislation from all government agencies which affect business operation, especially in regard to Occupational Health and Safety and environmental issues equal opportunity, industrial relations anti-discrimination relevant industry codes of practice

Appropriate persons may include:

- supervisors
- mentors
- trainers
- colleagues

Rights and responsibilities of employees may relate to:

- attendance
- punctuality
- obeying lawful orders
- confidentiality of information concerning the organisation, clients or colleagues
- safety and care with respect to Occupational Health and Safety policies
- knowing the terms and conditions of own employment
- the right to union representation protection from discrimination and sexual harassment

Organisation's requirements may be included in:

- organisational policies and guidelines
- common organisational practice
- performance plans
- Occupational Health and Safety policies, procedures and programs

Additional skills may be acquired by:

- on-the-job coaching or mentoring
- presentations/demonstrations
- formal course participation
- work experience

Behaviour which contributes to a safe work environment may include:

- discussing and negotiating problems and tasks with other team members
- sharing knowledge and skills
- identifying and reporting any risks or hazards
- using business equipment according to instructions

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 procedures manuals
- people management, interpersonal communication
- business planning, marketing and customer service

Work and personal priorities relate to a work/life balance and may include work and other commitments including:

- personal studies/assignments
- home/family recreational activities
- other jobs
- culture

Non-discriminatory attitudes may be displayed in:

- all contacts with other staff, clients or management
- verbal or non-verbal communication

Work priorities may vary according to:

- organisation requirements
- type of work
- degree of client/customer contact

Rights and responsibilities of employers include:

- the responsibility of providing a safe environment free from discrimination and sexual harassment

The right to dismiss an employee if he /she should:

- commit a criminal offence
- cause an accident through negligence or carelessness
- commit acts of disloyalty such as revealing confidential information

Appropriate dress and behaviour may relate to:

- personal dress, presentation and hygiene
- demeanour in the workplace
- attitude displayed to customers and other team members

Grooming to include:

- the use of hygiene aids, properly laundered garments, clean shoes, the range of fashions and hairstyles accepted as appropriate for the workplace

Posture to include:

- straight back, appropriate placement of feet (whether walking, standing, or sitting), upright positioning of body – according to physical capability

EVIDENCE GUIDE

This is an integral part of the assessment of competence and should be read in conjunction with the Range Statement.

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.

(1) Critical Aspects of Evidence

Ability to:

- express the organization's requirements including goals and values
- identify workplace procedures for maintaining employee and employer rights
- develop strategies for effective work practices

(2) Pre-requisite Relationship of Units

- Nil

(3) Underpinning Knowledge and Skills

<u>Knowledge</u>
Knowledge of:

- relevant features of legislation from all government agencies which affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations, and anti-discrimination
- award and enterprise agreements and relevant industrial instruments
- basic rules and expectations for workers and employees
- basic principles of time management

<u>Skills</u>
The ability to:

- process basic, relevant workplace documentation according to work requirements
- communicate to request advice, receive feedback and work with a team
- display problem-solving skills in order to resolve routine problems related to the workplace
- relate to people from a range of social, cultural, ethnic backgrounds and physical and mental abilities

(4) Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace.

(5) Method of Assessment

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

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.

(6)   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 NVQ-J Level. Refer to the Critical Employability Skill Levels at the end of this unit.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBCOR0591A: **Apply basic communication skills**

Competency Descriptor:

This unit covers the dev elopment of communication skills in the workplace. It entails the activities of gathering, conveying and receiving information, together with completing assigned written information under direct supervision.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Identify workplace communication procedures	1.1	Workplace communication requirements are identified with assistance from appropriate persons.
	1.2	Appropriate lines of communication with supervisors and colleagues are identified.
	1.3	Advice is sought on the communication method/equipment, which is most appropriate for the task.
	1.4	Effective questioning and active listening and speaking skills are used to gather and convey information.
	1.5	Instructions or enquiries are answered or followed promptly and appropriately.
	1.6	Appropriate non-verbal behaviour is used at all times.
	1.7	Constructive feedback is encouraged, acknowledged and acted upon.
2. Draft written information	2.1	Relevant procedures and formats are identified.
	2.2	Assigned written information is drafted and presented clearly and concisely for approval within designated timelines.
	2.3	Written information meets required standards of style, format and detail.
	2.4	Assistance and/or feedback is sought to aid communication skills development.

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:

Legislation, codes and national standards relevant to the workplace which may include:

- relevant legislation from all government which affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations, anti-discrimination
- relevant industry codes of practice

Lines of communication may be:

- formal and informal means
- verbal (non-verbal)

Organisational requirements may be included in:

- quality assurance and/or procedures manual
- goals, objectives, plans, systems and processes, business and performance plans
- legal and organisation policy/guidelines and requirements
- access and equity principles and practices
- ethical standards
- Occupational Health and Safety policies, procedures and programs
- quality standards for continuous improvement processes

Standards may include:

- standards set by work group
- organisational policies

Organisational procedures may relate to:

- workplace procedures related to specific tasks
- following instructions
- answering telephone calls
- requests from colleagues
- use of voice mail
- use of internet and e-mail
- informal discussions

Appropriate persons may include:

- supervisors, mentors or trainers
- colleagues
- other staff members

Communication method/equipment may include:

- computer network systems
- personal computer equipment including hardware, software and communication packages
- telephones
- facsimile machines
- keyboard equipment including mouse

Written information may include but is not limited to:

- handwritten and printed materials
- electronic mail
- facsimiles
- general correspondence or standard/form letters and memos
- telephone messages or general messages

EVIDENCE GUIDE

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

(1)   Critical Aspects of Evidence

- Seeks advice on most appropriate workplace communication methods and establishes lines of communication.
- Oral and written communication is clear, concise, correct and completed within designated timelines.
- Instructions are followed promptly and appropriately.
- Advice and feedback are actively sought, acknowledged and acted upon.

(2)   Pre-requisite Relationship of Units

- BSBCOR0011A   Prepare for work

(3)   Underpinning Knowledge and Skills

Knowledge
Knowledge of:

- relevant legislation from all levels of government which affect business operation, espec ially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations, anti -discrimination
- organisational policies, plans and procedures

Skills
The ability to:

- identify work requirements
- compose written business correspondence and inter-office communications
- process basic, relevant workplace documentation
- complete business forms
- identify lines of communication, request advice, effectively question, follow instructions, receive feedback and convey messages clearly and concisely
- to solve routine problems related to the workplace under direct supervision
- use business equipment relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

(4)   Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

(5)   Method of Assessment

Competency will be assessed while work is being done under direct supervision with regular checks, but may include some autonomy when working as part of a team.

Competency in this unit may be determined concurrently, based upon integrated project work.

Assessment may be by intermittent checking at the various stages of the job application in accordance with the performance criteria.

(6)   Context of Assessment

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

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 guideli nes in the Business Competency Standards.

Assessment should reinforce the integration of the Critical Employability Skills and the Business Competency Standards for the particular NVQ -J level. Refer to the Critical Employability levels at the end of this unit.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBCOR0171A: **Deliver quality customer service**

Competency Descriptor: This unit covers the skills and knowledge required to identify customer needs and provide a service to customers within a prescribed framework.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Identify customer needs	1.1	Appropriate interpersonal skills are employed to ensure that customers' needs are accurately identified.
	1.2	Customers' needs are assessed for urgency so that priorities for service delivery can be identified.
	1.3	Customers are provided with information about available options for meeting their needs and assisted to identify their preferred option.
	1.4	Personal limitations in addressing customer needs are identified and where appropriate, assistance is sought from designated person.
2. Deliver quality service to customers	2.1	Prompt customer service is provided to meet identified needs in accordance with organisational requirements.
	2.2	Appropriate rapport is established with customers to enable high-quality service delivery.
	2.3	Customers' complaints are handled sensitively and courteously in accordance with organisational requirements.
	2.4	Opportunities to enhance the quality of service and products are identified and taken whenever possible.

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:

Customers may be:

- from other agencies
- internal (members of the organization)
- individual members of the public

Designated individuals and groups are:

- those with sufficient knowledge and the level of responsibility to meet customer needs

Interpersonal skills may include:

- using appropriate body language
- summarising and paraphrasing to check understanding of customer's message
- providing an opportunity for the customer to confirm his/her request
- seeking feedback from the customer to confirm understanding of needs
- questioning to clarify and confirm the customer's needs
- listening actively to what the customer is communicating

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

Customer needs may relate to:

- advice or general information
- specific information
- further information
- making an appointment
- complaints
- purchasing the organisation's products and services
- returning organisation's products

Service and products are:

- specific to the organization

EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, underpinning 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

- accurate identification of customer needs through the use of appropriate interpersonal skills
- treating customers in a courteous and professional manner through all stages of service procedure
- application of organisational policies and procedures for responding to customer needs

(2)   Pre-requisite Relationship of Units

- BSBCOR0011A   Prepare for work
- BSBBAD0181A   Provide information to clients

(3)   Underpinning Knowledge and Skills

Knowledge   Skills
Knowledge of: The ability to:

- relevant legislation from all government   - access and use workplace information
  agencies that affect business operation,   - select and use technology
  especially in regard to Occupational   - utilise skills to identify customer needs
  Health and Safety and environmental   - deal with customer enquiries or complaints
  issues, equal opportunity, industrial   (problem solving skills)
  relations and anti-discrimination   - relate to people from a range of social,
- the organisation's business structure,   cultural and ethnic backgrounds and
  products and services   physical and abilities
- strategies for excellent customer service
- the organisation's policies and
  procedures for customer service
  including handling customer complaints
- customer feedback mechanisms and
  their special needs

(4)   Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally
used in the workplace.

(5)   Method of Assessment

Competency should be assessed while work is being done under direct supervision with regular
checks, but may take the form of some autonomy when working as part of a team, in order to
achieve outcomes within time.

(6)   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 and the Business Services
Common Competencies for the particular NVQ-J Level. Refer to the Critical Employability Skills
Levels at the end of this unit.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages processes • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBCOR0161A: **Handle telephone calls**

Competency Descriptor: This init deals with telephone techniques in answering and receiving calls to disseminate and receive information for smooth flowing of communication in an organization.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Receive telephone calls	1.1	Telephone calls are answered courteously and promptly using approved organization style.
	1.2	Callers are correctly identified and requirements accurately established.
	1.3	Call is correctly referred to the appropriate individual.
2. Analyse calls and route appropriately	2.1	Non-specific requirements are analysed and appropriate person or department to receive call is correctly determined.
	2.2	Where specific requests cannot be met, options and alternatives are identified and offered.
	2.3	Callers are given accurate information.
	2.4	Callers are kept informed of the reasons for any delay in connection.
	2.5	Callers are transferred correctly between extensions.
3. Answering, recording, & transcribing messages	3.1	Messages are recorded accurately, uncertainties clarified and messages passed to correct location promptly.
	3.2	Answering machines are correctly set to receive calls automatically.
	3.3	Recorded messages are accurately transcribed, urgent messages identified and all messages passed to the correct individual promptly.
	3.4	Records are up-to-date, legible and accurate.
4. Making telephone calls	4.1	Name and number of person to be called and purpose of the call are accurately determined.
	4.2	Call is placed in accordance with organizational procedures.

	4.3	Conversation is brought to a suitable conclusion, restating relevant points.
	4.4	Information is transmitted correctly and efficiently.
	4.5	Customers are satisfied with telephone exchange.
5. Adhere to confidentiality, security & equipment care procedures	5.1	Confidentiality and security procedures are maintained.
	5.2	Equipment faults are identified and promptly reported to an appropriate person.

RANGE STATEMENT

Competent performance of the criteria must be demonstrated in the context of this unit allowing the differences between enterprises. In addition the following variables may be present for this particular unit.

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 & Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- Relevant industry codes and practice

Callers to include:

- expected callers
- unexpected callers
- VIP's
- general public
- customers/clients
- salespersons
- business associates
- personal acquaintances
- family members

Confidentiality may refer to:

- private, personal and confidential business information received by telephone

Records:

- callers' log book
- message pad

Purpose of call – Caller may wish to:

- speak to particular person
- seek information
- access company services
- purchase merchandise
- schedule appointment

Telephone calls to include:

- long distance calls
- local calls
- international calls
- emergency calls

Non-routine/emergency demands to include:

- difficult and irate callers

Information:

- specific
- technical (e.g. e-mail)

Options and alternatives:	Security:

Options and alternatives:

- internal referrals
- referrals to other companies
- make information available at a later date

Security:

- In respect of telephone equipment including answering machine and voice mail

EVIDENCE GUIDE

(1)   Critical Aspects of Evidence

- Assesses learning opportunities to extend own personal work competencies on the use and operation of switchboard.
- Seeks feedback from clients and colleagues.
- Uses business technology to monitor calls and communication.
- Receives feedback constructively.
- Demonstrates good communication techniques in ending calls.

(2)   Pre-requisite Relationship of Units

- BSBCOR0171A   Deliver quality customer service

(3)   Underpinning Knowledge and Skills

Knowledge
Knowledge of:

- relevant legislation from all government agencies that affect business operation, especially in regard to occupational Health and Safety
- telephone techniques relevant to switchboard operation and features
- use of the telephone as a business opportunity
- do's and don'ts of telephone use as it applies to the organization

Skills
The ability to:

- take written messages including detail
- follow-up on calls as promises
- answer politely and pleasantly under extreme internal pressure
- listen keenly
- speak clearly
- display proper attitude
- summarize messages

(4)   Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace. These include:

- suitable work area with appropriate telephone equipment
- relevant furniture and equipment to execute job
- atmospheric condition appropriate to work environment

(5)   Method of Assessment

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

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

(6)   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 NVQ-J Level. Refer to the Critical Employability Skills at the end of this unit.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBBAD0081A: Develop keyboarding skills

Competency Descriptor: This unit deals with the development of basic keyboarding skills
                              using touch-typing techniques.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Use safe work practices	1.1	Workspace, furniture and equipment are adjusted to suit the ergonomic requirements of the user.
	1.2	Work organisation meets organisational and Occupational Health and Safety requirements for computer operation.
2. Identify and develop keyboarding skills	2.1	Keyboard functions are identified and applied.
	2.2	Touch-typing technique is applied to complete a task.
	2.3	Speed and accuracy are developed in accordance with workplace requirements for level of responsibility.
3. Check accuracy	3.1	Document is proofread carefully to identify errors.
	3.2	Document is amended, errors corrected and final accuracy check completed.

RANGE STATEMENT

The Range Statement provides advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises. It relates to the unit as a whole and facilitates assessment.

Statutory regulations, codes and national standards relevant to the workplace may include:

- award and enterprise agreements and
- relevant industrial instruments
- relevant legislation from all government
- which affect business operation, especially   with regard to Occupational Health
- and Safety and environmental issues, equal
- opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Work organisation may include:

- mix of repetitive and other activities
- rest periods
- exercise breaks
- VDU eye exercising

Ergonomic requirements may include:

- workstation height and layout
- chair height, seat and back adjustment
- footrest
- screen position
- keyboard and mouse position
- document holder
- posture
- anti-glare screen
- lighting
- noise minimisation

Touch-typing technique may vary according to:

- workplace requirements
- level of competency of operator

Expectations of speed and accuracy must be:

- consistent with degree of experience of the operator
- relevant to the level of responsibility

Keyboarding skills may relate to:

- alpha or numeric keyboard functions
- word processing, spreadsheets or data entry

EVIDENCE GUIDE

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

(1)   Critical Aspects of Evidence

- knowledge of organisational requirements to produce simple documents
- application of simple keyboard functions to produce documents with a degree of speed and accuracy relevant to the level of responsibility required

(2)   Pre-requisite Relationship of Units

- Nil

(3)   Underpinning Knowledge and Skills

<u>Knowledge</u>   <u>Skills</u>
Knowledge of: The ability to:

- relevant legislation from all levels of
- government agencies which affect
- business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity and industrial relations,
- organisational benchmarks for
- keyboarding
- ergonomic requirements for using
- keyboards
- basic keyboard functions
- basic touch typing techniques
- and strategies

- identify work requirements, to comprehend
- basic workplace documents and to produce and proofread simple documents
- identify lines of communication, request
- advice, effectively question, follow
- instructions and receive feedback
- solve routine problems in the workplace
- while under direct supervision
- use equipment safely and produce
- simple documents using the keyboard and the mouse
- relate to people from a range of social
- cultural, ethnic backgrounds and physical
- and mental abilities

(4)   Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace.

(5)   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.

(6)   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 NVQ-J Level. Refer to the Critical Employability Skills at the end of this unit.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages processes • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBBAD0671A: **Type and copy routine documents**

Competency Descriptor: This unit covers typing and copying simple routine documents such as basic letters, memos and forms.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA
1. Type routine documents	1.1 Original drafts are carefully checked.
	1.2 Clarification is sought where doubt exists.
	1.3 Documents are laid out and typed as instructed.
2. Correct errors or make adjustments	2.1 Documents are proofread and corrections made to any errors found.
	2.2 Additional changes requested are accurately done.
	2.3 Typed document is submitted for approval.
3. Store original documents	3.1 Original drafts are safely stored according to established standards.
4. Meet time frame/line	4.1 Assignment is completed on time.
	4.2 Relevant persons are informed of any existing problems that may delay delivery.
5. Photocopy routine documents	5.1 Photocopier is used according to manufacturer's instructions.
	5.2 Copies requested are produced in correct numbers and to standard specified/designated.
	5.3 Photocopies are sorted, staple securely and in correct order.
	5.4 Routine procedures are followed for dealing with photocopier problems.
	5.5 Problems requiring expert's assistance are reported to the relevant persons.

RANGE STATEMENT

The following statements cover a wide range of circumstances. Assessment of candidates should be within the range that applies to the candidate's particular role or function in the workplace.

Checking methods include:

- using a dictionary
- asking a supervisor
- asking another team member
- using computer spell check

Photocopier problems to include:

- need for paper
- original incorrectly positioned
- machine internal external problem(s)

Relevant person to include:

- supervisor/manager
- other staff members

EVIDENCE GUIDE

Evidence of competency is to be demonstrated by the ability to type and copy documents in accordance with the performance criteria and the Range Statement.

(1)   Critical Aspects of Evidence

Assessment of the candidate should produce evidence of the following:

- follow instructions
- accurately and correctly typed documents
- planning of tasks to be done
- clarifying misunderstanding when in doubt
- communicating difficulties experienced
- photocopier used according to manufacturer instructions and company policy
- documents prepared in agreed time

(2)   Pre-requisite Relationship of Units

- BSBBAD0081A   Develop keyboarding skills

(3)   Underpinning Knowledge and Skills

Knowledge   Skills
Knowledge of: The ability to:

- health and safety requirements   - type basic letters, memos reports and forms etc.
- importance of meeting deadlines
- importance of communicating   - proofread and correct errors
  difficulties/ problems   - format documents
                                               - use manual and or electronic dictionaries
                                               - store documents

(4)   Resource Implications

The following resources should be available:

- photocopier
- typewriter (if applicable)
- personal computer
- paper/stationery
- manufacture manual for photo copier
- filing system

(5)   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.

(6)   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 NVQ-J Level. Refer to the Critical Employability Skill Levels at the end of this unit.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBCOR0091A: Receive visitors

Competency Descriptor:

> This unit deals with the skills and knowledge required to receive visitors to an organization, while keeping set rules and procedures.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Receive and assist visitors	1.1	Visitor is greeted courteously.
	1.2	Purpose of visit is correctly ascertained.
	1.3	Visit is appropriately recorded and security clearance facilitated.
	1.4	Visitors are directed or escorted and introduced in accordance with company policy.
2. Relevant hospitality and emergency situation is addressed	2.1	Visitors are provided with appropriate hospitality facilities.
	2.2	Judgement and initiative are used to deal with non-routine and emergency demands promptly and effectively.
	2.3	Visitors are given only disclosable information.
	2.4	The availability of the person to be visited is correctly ascertained.
	2.5	Reasons for delay/non-availability of assistance are explained politely.
3. Identity is cleared, applying tact and necessary security measures	3.1	Visitors are correctly identified and requirements established accurately.
	3.2	Visitors with queries within scope of one's own responsibility are dealt with to their satisfaction.
	3.3	Visitors are handled with tact and diplomacy.
	3.4	Security and confidentiality procedures are maintained.

4.	Appropriate communication process is followed	4.1 Appropriate tone/manner is used in communication.
		4.2 Information is conveyed accurately, observing rules of confidentiality.
		4.3 Information, which is communicated, is clear and understood.

RANGE STATEMENT

Competent performance of the criteria provides advice to interpret the scope and context and must allow for differences between organizations.

Purpose of visit includes the need to:

- see a particular person
- seek information
- access company services
- purchase merchandise
- fulfil appointment

Records:

- visitors' log book
- message pad
- appointment book
- despatch book
- incoming correspondence book

VISITORS TO INCLUDE:

- expected and/or unexpected callers
- general public
- customers/clients
- salespersons
- business associates
- personal acquaintances
- family members

Communication may be with:

- supervisors /managers
- peers
- clients/customers
- general public

Non-routine/emergency demands to include:

- difficult and irate persons
- persons who pose a security risk

EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit.

(1)   Critical Aspects of Evidence

- seeking and acting on feedback from internal and external visitors
- prioritising and scheduling human traffic
- treating visitors in a courteous and professional manner
- accurate identification of visitors through the use of appropriate interpersonal skills
- identifies visitors accurately

(2)   Pre-requisite Relationship of Units

- Nil

(3)   Underpinning Knowledge and Skills

Knowledge
Knowledge of:

- the organization's business structure, products and services
- 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
- principles of effective communication in relation to listening, questioning and non-verbal communication
- organization's policies and procedures including dress code guide
- importance of demonstrating respect and empathy in dealing with colleagues and customers

Skills
The ability to:

- request advice, receive feedback and work with a team (communication skills)
- understand basic workplace documentation (reading skills)
- relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities (interpersonal skills)
- select and use technology appropriate to a task

(4)   Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace, which will include:

- suitable work area with appropriate communication equipment
- stationery
- relevant furniture and equipment to execute job
- ventilation appropriate to environment

(5)   Method of Assessment

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

(6)   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 key competencies and the Business Services Common Competencies for the particular NVQ-J Level. Refer to the Critical Employability Skills levels at the end of this unit.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBBAD0681A: Locate and store files in a paper-based system

Competency Descriptor: This unit covers locating and returning files stored in a simple paper-based filing system.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Locate files	1.1	Correct procedures are followed to locate files.
	1.2	Problems with files are identified and reported to relevant persons.
	1.3	Files and their contents are kept safe and intact.
	1.4	Files, requested are delivered on time to relevant persons requesting.
	1.5	Confidentiality is maintained in handling files.
	1.6	Procedures for issuing and or circulating files are correctly followed.
2. Update and store files	2.1	New items to file are added as instructed or according to company policy.
	2.2	Files and contents are checked for completeness.
	2.3	Files are stored within time frame established.
	2.4	Files are stored in the correct location, using index system established.
	2.5	Correct procedures for storing the files are followed.
	2.6	Confidential information is treated appropriately and in keeping with company policy.
3. Handle returned file	3.1	Procedures for handling returned files are correctly followed.
	3.2	Returned files are replaced within the time frame established.

RANGE STATEMENT

The following statements cover a wide range of circumstances. Assessment of candidate should be within the range that applies to the candidate's particular role or workplace.

Updating files:

- adding new items
- storing items
- disposal of items

Relevant persons:

- supervisor
- person requesting files

Locate files:

- store alphabetically
- store numerically

EVIDENCE GUIDE

Evidence of competency is to be demonstrated by the ability to locate and store files in accordance with the performance criteria and the Range Statement.

(1)   Critical Aspects of Evidence

Assessment of the candidate should produce evidence of the following procedures:

- following instructions
- identifying and reporting problems
- maintaining efficient and neat filing system
- use of alphabetical and numerical filing system
- use of indexes
- safe keeping of files and their contents
- locate and return files within time frame established
- handle confidential information
- understanding and using retention policy
- use of filing equipment and storage
- use of tracer or guide system

(2)   Pre-requisite Relationship of Units

- BSBCOR0011A   Prepare for work

(3)   Underpinning Knowledge and Skills

<u>Knowledge</u>   <u>Skills</u>
Knowledge of: The ability to:

- alphabetical and numerical filing system
- advantage and disadvantage of different filing systems
- systems in organisations
- safety and security procedures
- elements of good filing system
- importance of a tracer or out guide systems
- cross-referencing
- retention policy
- different indexing system
- vertical and lateral filing

- operate alphabetical filing system
- operate numerical filing system
- use indexing and cross-referencing system
- locate, issue and return files
- use tracer and or guide system
- dispose of items following retention policies
- use filing equipment
- perform vertical and lateral filing

(4)   Resource Implications

The following resources should be available:

- filing cabinet
- indexing cards
- filing policy and policy manual

(5)   Method of Assessment

Competency should be assessed while work is under taken under direct supervision with regular checks, but may include some autonomy when working as part of a team.

Assessment must be in accordance with the performance criteria

(6)   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 NVQ-J Level. Refer to the Critical Employability Skill Levels at the end of this unit.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBCOR0071A: Operate a personal computer

Competency Descriptor:

> This unit describes the competencies required to start up a personal computer or business computer terminal, correctly navigate the desktop environment and use a range of basic functions.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Start computer and access basic system information and features	1.1	Computer is started or user logged on according to user procedures.
	1.2	Basic functions and features are identified using system information.
	1.3	Desktop configuration is customised in a manner suitable to meet individual requirements and/or special needs and according to company guidelines.
	1.4	Information on disks is erased and disks are formatted when necessary using the appropriate and correct procedures.
	1.5	Available help functions are used as required.
2. Navigate and manipulate desktop environment	2.1	Desktop icons are correctly selected, opened and closed to access features (directories/folders, files, network devices, recycle bin and waste basket).
	2.2	Different roles and parts of the desktop window are identified for particular functions.
	2.3	The opening, resizing and closing of desktop windows for navigation purposes follow correct procedures.
	2.4	Shortcuts from the desktop are created if necessary with assistance from appropriate persons.
3. Organise basic directory and folder structures	3.1	Directories/folders with subdirectories/subfolders are created and named according to established guidelines.
	3.2	Directory/folder attributes (size, date, name etc) are identified.

		3.3	Sub-directories/folders are moved between directories/folders following correct and appropriate procedures.
		3.4	Directories/folders are renamed as required.
		3.5	Directories/folders and subdirectories/folders are accessed via different paths.
4.	Organise files for use	4.1	The most commonly used types of files in a directory/folder are identified.
		4.2	Files are created and suitably named when required.
		4.3	Groups of files are selected, opened and renamed as required.
		4.4	Files are copied or cut and pasted across directories.
		4.5	Files are copied to disk where necessary.
		4.6	Deleted files are restored as necessary.
		4.7	Software tools are used to locate files.
5.	Print information	5.1	Information printed is from installed printer.
		5.2	Progress of print jobs is reviewed and deleted as r equired.
		5.3	Default printer is changed for installed list if available.
6.	Shutdown computer	6.1	All open applications are closed using correct procedures
		6.2	Computer is shutdown in accordance with user procedures.

RANGE STATEMENT

This Range statement provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of Government which affect business operation, especially in regard to(OHS) and environmental issues, equal opportunity, industrial relations, anti -discrimination.
- relevant industry codes of practice

IT components may include:

- hardware
- software
- communication packages

Software may include, but are not limited to:

- word processing
- spread sheet
- graphical
- imaging
- internet access

Functions may include, but not limited to:

- print
- help
- format
- edit
- search

Documents may include but are not limited to:

- help files
- established files and applications

Operating systems may include:

- command line and graphical user interface

Disks may include but are not limited to:

- diskettes
- CDs
- zip disks

Hardware components may include:

- personal computer
- network system
- printer
- attached peripherals

OHS standards may include:

- statutory requirements
- OHS guidelines related to the use of the screen equipment, computing equipment and peripherals, ergonomic work stations, security procedures, customisation requirements

Operating systems including:

- command line
- graphic user interface

EVIDENCE GUIDE

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

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.

(1)   Critical Aspects of Evidence

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

- Ability to perform start up a nd filing procedures, file name convention
- Navigates and manipulates the desktop environment within the range of assigned workplace tasks
- Indicate compliance with organizational policies and procedures
- Perform all tasks in accordance with standard operatin g procedures
- Use software tools effectively
- Interactively communicate with others to ensure safe and effective workplace

(2)   Pre-requisite Relationship of Units

- BSBBAD0011A   Prepare for work
- BSBBAD0121A   Communicate in the workplace

(3) Underpinning Knowledge and Skills

Knowledge
Knowledge of:

- relevant legislation from all levels of government which affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations, ant i-discrimination
- organisational benchmarks for keyboarding
- basic ergonomics of keyboard and computer use
- main types of computers and basic features of different operating system
- main parts of a computer
- storage devices and basic categories of memory
- relevant types of software
- suitable file naming conventions
- general security, viruses, privacy legislation and copyright

Skills
The ability to:

- identify work requirements, comprehend basic workplace documents and interpret basic user manuals
- identify lines of communication, request advice, question effectively, follow instructions and receive feedback
- solve routine problems in the workplace, while under direct supervision
- use equipment safely while under direction, apply basic keyboard and mouse manipulation skills
- utilise logging procedures relating to accessing a PC
- relate to people from a range of social, cultural and ethnic backgrounds and abilities

(4) Resource Implications

The learner and trainer should have access to appropriate documentation and res ources normally used in the workplace including:

- personal computer
- access to printer

(5) Method of Assessment

Competence in this unit may be assessed using formative assessment to ensure consistency of performance in a range of contexts.

Assessment of this unit of competence could include review of documents developed by the candidate. Questions related to the performance criteria and directed to the candidate, peers and business client will assist in assessing competence. Observation of skills will assist in the collection of evidence.

Simulated activities must closely reflect the workplace.

Peers and supervisors must be available to give information on the extent and the quality of contribution made.

(6)   **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 th e critical employability skill and the Business Services Common Competencies for the particular NVQ-J Level. Refer to the Critical Employability Skills at the end of this unit.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
Carries out established processes Makes judgement of quality using given criteria	Manages processes Selects the criteria for the evaluation process	Establishes principles and procedures Evaluates and reshapes process Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBBAD0031A: **Use business equipment**

Competency Descriptor: This unit deals with the skills and knowledge required to choose resources to complete a variety of tasks under direct supervision. It includes operating equipment, undertaking routine maintenance and reporting faults to the appropriate person.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Select equipment/resources	1.1	Business equipment or resources required to complete task are identified and accessed under direct instructions.
	1.2	Quantities and resources are correctly estimated to complete the task.
	1.3	Equipment is checked for serviceability in accordance with equipment instructions.
2. Operate equipment	2.1	Equipment is operated in accordance with manufacturer's instructions and under direct instructions.
	2.2	Repairs outside area of operator's responsibility are reported to appropriate persons.
3. Maintain equipment/resources	3.1	Equipment/resources to support completion of tasks are maintained under direct instructions.
	3.2	Maintenance is undertaken to ensure equipment meets manufacturer's specifications.
	3.3	Records concerning equipment/resources are maintained under direct instructions.
	3.4	Equipment and resources are stored under direct instructions.

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:

Legislation, codes and national standards relevant to the workplace which may include:

- relevant legislation from all government agencies which 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

Equipment instructions may include:

- manufacturer's guidelines
- procedures manual
- Occupational Health and Safety guidelines and procedures
training notes

Organisational requirements may be included in:

- goals, objectives, plans, systems and processes
- legal and organisation policies/guidelines and requirements
- business and performance plans
- confidentiality and security requirements
- access and equity principles and practice
- ethical standards
- Occupational Health and Safety policies, procedures and programs
- defined resource parameters

Records may include:

- equipment service call forms
- service repair forms
- purchase orders
- warranties

Business equipment may include:

- photocopier
- printer
- binder
- answering machine
- fax machine
- telephone

Business resources may include:

- facilities
- equipment
- human resources
- Occupational Health and Safety resources stock and supplies

Appropriate persons may include:

- supervisor
- colleagues
- external organisations
- line management

Maintenance may include:

- adding toner
- cleaning equipment regularly
- replacing paper
- clearing paper jams
- organising service calls

EVIDENCE GUIDE

(1)   Critical Aspects of Evidence

- Provides evidence of listening carefully and following instructions on how to select and operate equipment.
- Undertakes routine maintenance while following instruc tions in accordance with operating manual.
- Communicates faults and/or risks to appropriate people.

(2)   Pre-requisite Relationship of Units

BSBBAD0201A   Participate in workplace safety procedures

(3)   Underpinning Knowledge and Skills

Knowledge
Knowledge of:

- relevant legislation from all government agencies which 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
- the organisation's policies, plans and procedures that relate to the use of business equipment
- the functions of a range of business equipment
- the correct shut-down procedures for a range of business equipment
- common equipment faults
- routine maintenance procedures

Skills
The ability to:

- identify work requirements and process basic, relevant workplace documentation
- display communication skills to identify lines of communication, request advice, effectively question, follow instructions, receive feedback and report equipment faults
- solve routine problems related to business equipment and to determine appropriate fault repair actions while under direct supervision
- apply technology skills to use business equipment under direction
- relate to people from a range of social, cultural, ethnic backgrounds and physical mental abilities

(4)   Resource Implications

- The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

(5)   **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.

(6)   **Context of Assessment**

Competency is demonstrated by performance of all stated criteria, including paying particular attention to the critical aspects and the knowledge an d 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 un it should be undertaken in an actual workplace or simulated environment.

Assessment should reinforce the integration of the key competencies and the Business Services Common Competencies for the particular NVQ -J Level Refer to the Critical Employability Skills at the end of this unit.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. The y relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1.	Level 2.	Level 3.
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employabili ty Skills.

BSBCOR0041A   **Develop professionalism**

Competency Descriptor: The unit deals with one's development within the workplace/organization by applying the necessary skills and knowledge for future development under the guidance of an appropriate advisor.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Seek advice on future career directions	1.1	Possible career directions in industry or organisation are identified.
	1.2	Personal work goals are identified and prioritised.
	1.3	Future work/career directions are discussed with appropriate persons and additional skills requirements are identified.
	1.4	Personal values and attitudes regarding work and business are taken into account when planning future work/career directions.
2. Conduct self-assessment of skills with assistance	2.1	Work, life and study experiences relating to business are identified.
	2.2	Current skills, knowledge and attitudes are assessed against a checklist of target competencies, in conjunction with immediate supervisor.
	2.3	Results of self- assessment are discussed with trainer or assessor.
	2.4	Further skills development needs are identified.
3. Prepare portfolio of evidence	3.1	Types of evidence required are identified and discussed.
	3.2	Examples of evidence are collected for portfolio.
	3.3	Application for recognition of current competency or personal resume is completed with assistance from the supervisor.

RANGE STATEMENT

This provides advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces.

Types of evidence may include:

- academic results including informal studies
- work experience
- previous employment
- volunteer work
- personal interests
- leisure time pursuits/hobbies

Opportunities for review and assessment may be:

- with immediate supervisor, training personnel or other team members
- structured and unstructured simulations

Opportunities for development:

- excelling in normal duties
- in-house/external training
- independent training
- career advancement

Advice may include:

- formal/informal performance appraisals
- feedback from supervisors and colleagues
- career counselling
- feedback/guidance from practitioner

Personal resume may include:

- contact details
- education and extra-curricular activities
- work experience
- past employment and/or volunteer work
- professional development (i.e. participation in formal courses or seminars)
- personal attributes, skills, strengths
- work - related or personal references

Evidence may be provided to:

- document and assess current competencies relevant to the workplace
- build a picture of personal attributes
- identify areas for further skill development
- identify strengths and weaknesses

Additional skills may be acquired by:

- on-the-job coaching or mentoring
- formal course participation
- attendance at workshop or demonstration
- work experience

Feedback may be received by:

- obtaining oral or written comments from supervisors and colleagues
- receiving guidance, technical support and information to assist performance

Checklist may include:

- practical skills
- personal skills and attributes
- strengths and weaknesses

Information on employment opportunities may be gained from:

- trainer or mentor
- newspapers or other media
- libraries
- job reference centre or employment centres
- web- based programs and information sites
- job/career fairs

EVIDENCE GUIDE

Competency is to be demonstrated by carrying out planning skills development in accordance with Performance Criteria using any of the range of materials and processes listed within the Range Statement.

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 under a variety of situations.

(1)   Critical Aspects of Evidence

- seeks to identify and document current competencies, personal strengths and weaknesses, areas for future skill development and career direction
- demonstrates current competencies

(2)   Pre-requisite Relationship of Units

- Nil

(3)   Underpinning Knowledge and Skills

Knowledge
Knowledge of:

- relevant legislation from all government agencies which affect business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- skills development in career planning terms
- ways of creating portfolios of evidence and the types of evidence
- methods to identify and document relevant information

Skills
The ability to:

- access information to identify career options and personal work goals, and to draft a portfolio of evidence
- identify and resolve routine problems related to the workplace under direct supervision
- use business equipment under direction
- relate to people from a range of social, cultural, and ethnic backgrounds and physical and mental abilities

(4)   Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace.

(5)   Method of Assessment

Competency will be assessed through direct observation of application to tasks and questions related to underpinning knowledge.

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

(6)   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 NVQ-J Level. Refer to the Critical Employability Skills Levels at the end of this unit.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBCOR0101A: **Work effectively in a business environment**

Competency Descriptor: This unit deals with the skills and knowledge required to work effectively within a commercial or business environment. It includes identifying the rights and responsibilities of employees and employers, and conducting business in accordance with the organisational goals, values and standards.

Competency Field: Business Administration Service

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Work within organisational requirements	1.1	Documents outlining organisational requirements are located, read and any uncertainties are clarified with appropriate persons.
	1.2	All work reflects a current working knowledge and understanding of employees and employers rights and responsibilities.
	1.3	All work undertaken reflects understanding and compliance with relevant duty of care, legal responsibilities and organisational goals and objectives.
	1.4	Standards and values considered to be detrimental to the organisation are identified and questioned through established communication channels.
	1.5	Behaviour, which contributes to a safe work environment, is identified and practised.
2. Determine future work/career directions	2.1	Personal work goals are identified and prioritised in accordance with organisational requirements and future career plans.
	2.2	Personal values and attitudes regarding work and business are taken into account when planning future work/career directions.
	2.3	Additional skills required are identified and addressed.

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.

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

Rights and responsibilities of employees may relate to:

- attendance
- punctuality
- obeying lawful orders
- confidentiality and privacy of enterprise, client and colleague's information
- safety and care with respect to Occupational Health and Safety
- knowing the terms and conditions of own employment
- the right to union representation
- protection from discrimination and sexual harassment

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 procedures manuals
- people management
- interpersonal communication
- business planning
- marketing and customer service

Appropriate persons may include:

- those who have the authority to adjust plans
- supervisors
- colleagues
- external organisations line management staff

Organisation's requirements may be included in:

- goals, objectives, plans, systems and processes
- legal and organisation policy/guidelines and requirements
- business and performance plans
- access and equity principles and practice
- anti-discrimination and related policies
- ethical standards
- quality standards and processes for and continuous improvement
- Occupational Health and Safety policies, procedures and programs

Rights and responsibilities of employers include:

The responsibility of providing a safe environment free from discrimination and sexual harassment

- The right to dismiss an employee if he/she:

- commit a criminal offence
- causes an accident through negligence or carelessness
- commit acts of disloyalty such as revealing confidential information

Behaviour which contributes to a safe work environment may include:

- discussing and negotiating problems and tasks with other team members
- solving problems as a team
- sharing knowledge and skills
- identifying and reporting any risks or hazards
- using business equipment according to guidelines
- listening to the ideas and opinions of others in the team

Advice may include:

- formal/informal performance appraisals
- obtaining feedback from supervisors and colleagues
- personal, reflective behaviour strategies
- career counselling

Additional skills may be acquired by:

- on-the-job coaching or mentoring
- additional responsibilities
- presentations/demonstrations
- formal course participation
- work experience
- involvement in professional networks

EVIDENCE GUIDE

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

(1)   Critical Aspects of Evidence

- ability to identify, locate and express the organisation's requirements including goals and values
- work reflects the relationship between own role and organisational requirements
- own future career plans are developed
- workplace procedures for upholding employee and employer rights and responsibilities can be identified and clearly explained

(2)   Pre-requisite Relationship of Units

- Nil

(3)   Underpinning Knowledge and Skills

Knowledge
Knowledge of:

- 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
- organisation's policies, plans and procedures and how to access them
- terms and conditions of employment
- the types of actions which uphold the organisation's image
- how to use information systems to source and access new learning opportunities

Skills
The ability to:

- identify work requirements and process basic, relevant workplace documentation
- request advice, receive feedback and work with a team
- develop future career goals
- solve routine problems in the workplace while under direct supervision
- select and use technological skills
- relate to people from a range of social, cultural and ethnic backgrounds

(4)   Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace

(5)   Method of Assessment

Competency should be assessed while work is being done under direct supervision with regular checks, but may take the form of some autonomy when working as part of a team, in order to achieve outcomes within time.

(6)   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 NQV-J Level. Refer to the Critical Employability Skills at the end of this unit.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBCOR0201A: Participate in workplace safety procedures

Competency Descriptor: This unit covers general Occupational Health and Safety requirements in business organisations and is essential for employees without managerial or supervisory responsibilities.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA
1. Follow workplace procedures for hazard identification and risk control	1.1 Hazards in the work area are recognised and reported to designated personnel according to workplace procedures.
	1.2 Workplace procedures and work instructions for assessing and controlling risks are followed accurately.
	1.3 Workplace procedures for dealing with incidents (accidents), fire and other emergencies are followed whenever necessary within the scope of responsibilities and competencies.
2. Contribute to Occupational Health & Safety (OH&S) in the workplace	2.1 Occupational Health and Safety issues are raised with designated personnel in accordance with workplace procedures and relevant Occupational Health and Safety legislation.
	2.2 Contributions are made to participative arrangements for Occupational Health and Safety management in the workplace, within organisational procedures and the scope of responsibilities and competencies.

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:

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, industrial relations and anti-discrimination
- relevant industry codes of practice
- hazard reporting procedures
- job procedures and safe work instructions and allocation of responsibilities

- emergency procedures
- accident and 'near miss' reporting and recording procedures
- consultation on Occupational Health and Safety issues
- correct selection, use, storage and maintenance procedures for use of personal protective equipment (PPE)
- control of risks

Designated personnel may include:

- supervisors
- managers
- team leaders
- designated Occupational Health and Safety Officers
- health and safety representatives
- other persons authorised or nominated by the enterprise or industry to:
    - perform specified work
    - approve specified work
    - inspect specified work
    - direct specified work

Participative arrangements may include:

- formal and informal health and safety meetings
- health and safety committees
- other committees, for example, consultative planning and purchasing
- meetings called by health and safety representatives
- suggestions, requests, reports and concerns put forward to management

Contributions may include:

- behaviour that contributes to a safe working environment
- identifying and reporting risks or hazards
- using business equipment according to guidelines
- listening to the ideas and opinions of others in the team
- sharing opinions, views, knowledge and skills

Emergencies may include:

- chemical spills
- bomb threats
- fire
- occupational violence
- earthquake
- flood
- hurricane

Hazards identification may include:

- checking equipment or the work station area before and during work
- workplace inspections
- on-the-job housekeeping checks

EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, underpinning 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.

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.

(1)   Critical Aspects of Evidence

- hazards are recognised and reported to designated personnel
- all relevant workplace procedures are accurately followed
- hazards and risks in the workplace are communicated
- contribution is made to the management of occupational health and safety in the workplace at level of own responsibility

(2)   Pre-requisite Relationship of Units

- BSBCOR0011A   Prepare for work

(3)   Underpinning Knowledge and Skills

Knowledge
Knowledge of:

- 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
- ways in which OH&S is managed in the workplace including procedures for fire, emergency, accident and near miss, and control of risks
- workplace hazards
- designated personnel responsible for reporting OH&S concerns
- the meaning of OH&S signs and symbols relevant to area of work

Skills
The ability to:

- follow safe work and emergency instructions
- communicate using OH&S reporting requirements
- participate in group meetings
- understand workplace procedures and work instructions for identifying and reporting hazards
- interpret OH&S signs and symbols
- relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

(4)   Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace.

(5)   Method of Assessment

Competency should be assessed while work is being done under direct supervision with regular checks, but may take the form of some autonomy when working as part of a team, in order to achieve outcomes within time.

(6)   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 NVQ-J Level. Refer to the Critical Employability Skills at the end of this unit.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBFIN0721A: **Prepare routine financial documents**

Competency Descriptor: This unit covers knowledge necessary to complete petty cash
                           reimbursements, purchase requisitions and receipt documentation.

Competency Field: Finance

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA
1. Claim reimbursement from a petty cash fund	1.1 Petty cash voucher is completed according to enterprise guidelines.
	1.2 Voucher is presented to authorised person for reimbursement.
2. Complete requisitions	2.1 Purchase and/or internal stock requisitions are completed according to enterprise guidelines.
	2.2 Purchase/stock requisition is presented to nominated person for authorisation.
	2.3 Purchase/stock requisition is presented within designated timelines to nominated person for processing.
3. Complete receipts	3.1 Receipts are completed according to enterprise guidelines.
	3.2 Receipts are presented to nominated person for authorisation.
	3.3 Receipts are forwarded to payer according to enterprise guidelines.

RANGE STATEMENT

Competent performance of the performance criteria must be demonstrated in the context of this unit allowing for the differences between enterprises and workplaces. In addition the following variables may be present for this unit.

Business source documents used may include, but are not exclusive to the following:

- petty cash vouchers
- petty cash book
- purchase/stock requisitions
- quotations
- receipts

Recording mechanisms/systems, may be:

- paper-based
- electronic
- enterprise accounting system

EVIDENCE GUIDE

Evidence of satisfactory performance in this unit is best obtained by observation of performance and questioning to indicate understanding and knowledge of preparing routine financial documents in accordance with enterprise procedures and policies.

(1)   Critical Aspects of Evidence

- documents are completed accurately
- numerical information is self-checked
- petty cash vouchers are accompanied by receipts
- purchase/stock requisition is accompanied by quotation or other substantiation where necessary
- documents are distributed within designated timelines

(2)   Pre-requisite Relationship of Units

- Nil

(3)   Underpinning Knowledge and Skills

Knowledge   Skills
Knowledge of: The ability to:

- source of origin of documents   • complete all types of documents
- procedures for completing documents   including:
- types of documents   • reimbursements
                                                            • purchase requisition
                                                            • receipts

(4)   Resource Implications

Resources to include relevant documentation and other physical resources normally used in the workplace.

(5)   Method of Assessment

Competency should be assessed under direct supervision, checking at various stages of the process and the completion of activity against the performance criteria.

(6)   Context of Assessment

Competency should be assessed in the workplace or simulated workplace environment in accordance with workplace practice and safety procedures.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBBAD0181A: Provide information to clients

Competency Descriptor: This unit covers the skills and knowledge required to greet clients and determine their needs in accordance with the organisation's requirements.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Establish contact with clients	1.1	Communication with clients is conducted in a professional and courteous manner according to organisational requirements.
	1.2	Personal dress and presentation is maintained in line with organisational requirements.
	1.3	Appropriate interpersonal skills are used to facilitate accurate and relevant exchange of information.
	1.4	All work reflects sensitivity to client's specific needs.
2. Respond to client enquiries	2.1	Client enquiries are responded to promptly and politely.
	2.2	Appropriate questioning and active listening are used to determine client needs.
	2.3	Telephone calls are answered and made in accordance with organisational requirements.
	2.4	Information relevant to client needs is provided in line with organisational requirements.
	2.5	Enquiries outside area of responsibility/knowledge are referred to nominated person/s for resolution.
	2.6	Additional information or follow-up action is completed in line with client needs and organisational timelines.

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:

Organisational requirements may be included in:

- goals, objectives, plans, systems and processes
- business plans
- Occupational Health and Safety policies, procedures and programs
- legal and organisation policies/guidelines and requirements
- access and equity principles and practice
- quality standards for continuous improvement processes
- job description
- defined resource parameters

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

Interpersonal skills may include:

- using appropriate body language
- summarising and paraphrasing to check understanding of client's message
- providing an opportunity for the client to confirm his/her request
- questioning to clarify and confirm the client's needs
- listening actively to what the client is communicating

Responding to enquiries may include:

- arranging appointments
- providing information about products and services or general information
- referrals to other colleagues/departments
- clarifying or resolving problems

Clients may be:

- internal or external
- from other agencies
- individual members of the organisation
- individual members of the public

Enquiries may be made through:

- face-to-face contact
- email
- fax
- telephone

Sensitivity may include:

- respect for diversity
- empathy (understanding how other people feel)

Nominated persons may include:

- those who have the relevant knowledge and authority to exercise the responsibility

EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, knowledge and skills to be demonstrated to confirm competency for this unit.

(1)   Critical Aspects of Evidence

- application of organisational requirements for responding to client enquiries and promoting products and services
- prompt and polite responses to visitors or telephone enquiries
- correct and current information about the organisation's products and services is provided

(2)   Pre-requisite Relationship of Units

- BSBCOR0031A   Apply basic communication skills

(3)   Underpinning Knowledge and Skills

<u>Knowledge</u>
Knowledge of:

- 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
- types of resources available within the organisation and how to access them
- organisational policies and procedures relating to client service
- techniques of oral and written communication, including telephone techniques

<u>Skills</u>
The ability to:

- convey information clearly, concisely and coherently
- use questioning and active listening skills to identify client requests
- deal with client enquiries or complaints
- relate to people from a range of social, cultural, ethnic backgrounds and physical and mental abilities

(4)   Resource Implications

- the learner and trainer should have access to appropriate documentation and resources normally used in the workplace

(5)   Method of Assessment

Evidence should be collected over a set period of time, which is sufficient to include dealing with an appropriate range and variety of situations e.g. dealing with different office requirements, different types of work documents and over a period of time to ensure that situational variables are consistently achieved.

(6)   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 NVQ-J Level. Refer to the Critical Employability Skills Levels at the end of this unit.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

FNBFIN0701A: Prepare and bank financial receipts

Competency Descriptor: This unit describes the functions involved in preparing and banking financial receipts.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Batch monetary items	1.1	Items are batched completely and accurately.
	1.2	Batch items are matched to initial receipt records.
2. Prepare deposit facility	2.1	Deposit facility selected is appropriate to the banking method used.
	2.2	Batch is balanced with deposit without error.
3. Prepare lodgement flows	3.1	Security and safety precautions are taken appropriate to the method of banking in accordance with company policy.
	3.2	Proof of lodgement is obtained and filed in accordance with company procedures.

RANGE STATEMENT

Competent performance of the performance criteria must be demonstration in the context of this unit allowing for the differences between enterprises and work places. In addition, the following variables maybe present for this unit.

Security measures may include:

- banking of all negotiable instruments on day received
- all batches posted on day of receipt
- cash management processes

Batches

- batches are grouped
- receipts treated as a separate entity

Banking methods may include:

- personal
- through third party security company
- pick-up

Deposit facilities may include:

- bank deposit slip
- direct debit transaction report

Proof of lodgement may include:

- bank stamped deposit facility
- verified transaction listing

Monetary items to include:

- cash various denomination/currency
- cheques
- coins

Industry and legislative requirements may cover:

- Accounting Standards
- Financial Services Act
- Consumer Credit legislation – Fair Trading Act
- Privacy Act
- Taxation Act
- Industry Code of Practice
- Securities & Companies Act
- Stamp Duties Act

Systems to include:

- computer-based

'Policy' means a policy statement.

'Procedures' means operating procedure

Company policy and procedures may include:

- operations manuals
- internal control guidelines
- computer system documentation

EVIDENCE GUIDE

This unit requires a variety of contexts of assessment over a period of time sufficient to establish that competency has been demonstrated.

(1)   Critical Aspects of Evidence

- cash management process
- use banking methods
- use of electronic systems
- apply security measures
- use deposit facilities
- interpret policy and legislations

(2)   Pre-requisite Relationship of Units

- Nil

(3)   Underpinning Knowledge and Skills

Knowledge
Knowledge of:

- company policy and procedures
- knowledge or awareness of relevant Acts and regulations
- legal systems and procedures
- industry codes of practice
- computer systems
- procedure on writing financial documents

Skills
The ability to:

- use computerised spreadsheet and database
- conduct data analysis and interpretation
- evaluate ad analyse
- negotiate and interact
- use deposit facilities
- prepare and batch receipts

(4)   Resource Implications

Resources to include relevant documentation and other physical resources normally used in the workplace. This should include:

- procedures and policy document
- deposit slips
- lodgement bags
- recording books

(5)   Method of Assessment

Competency should be assessed under direct supervision, checking at various stages of the process and at the completion of the activity against the performance criteria.

(6)   Context of Assessment

Assessment of performance requirements in this unit should be undertaken within the Financial Services Industry context and should cover aspects of personal/financial responsibility and accountability.

Competency is demonstrated by performance of all stated criteria, including the Range Statement applicable to the workplace environment. Aspects of competency, including the attainment of relevant knowledge and skills, may be assessed in a relevant workplace, a closely simulated work environment, or other appropriate means that clearly meet industry competency requirements.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

ITCCOR0081A: **Sell products and services**

Competency Descriptor: This unit applies to selling of a wide range of products and services to a wide cross section of customers.

Competency Field: Telecommunication

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Establish customer needs	1.1	Person called is correctly identified.
	1.2	Customer is dealt with in a helpful and polite manner.
	1.3	Stressful situations are appropriately handled.
	1.4	Techniques are appropriately employed to put customer at ease.
	1.5	Number of calls abandoned is within the established standard.
	1.6	A sufficient number of questions are directed to the customer with a view to extracting the requisite information.
	1.7	Questions directed to the customer are pertinent for extracting the requisite information.
	1.8	The customer's responses are documented in the prescribed manner.
	1.9	Verification is obtained from the customer that his needs are fully understood.
	1.10	The conclusion of the dialogue with the customer indicates that the customer's needs will be considered in the development/reviews of the product/service.
	1.11	Information gleaned is accurately documented to permit management review.
2. Promote the features and benefits of the products and services	2.1	On every occasion of customer contact the features and benefits of the organization's products/services are told to the customer.
	2.2	Explanations given to customer re benefits of products/services are thorough.

		2.3	Explanations re products/services are articulated in a manner that is pleasant and persuasive.
		2.4	The dialogue with the customer is conducted in such a manner that the values and attitudes of the organization are projected to the customer.
3.	Exploit opportunities for up-selling and cross-selling	3.1	Customer is always correctly identified.
		3.2	Customer is dealt with in a helpful and polite manner.
		3.3	Techniques are appropriately employed to put customer at ease.
		3.4	Number of calls abandoned is within the set standard.
		3.5	Opportunity is taken to introduce additional products.
		3.6	Questions/proposals are directed to the customer in a manner that encourages additional purchases.
		3.7	Questions successfully solicit customer needs.
4.	Gain and confirm customer commitment	4.1	Sales techniques encourage customer interest in organization's product.
		4.2	Commitment to purchase the organization's product is successfully negotiated with the customer.
		4.3	Verification of product purchased is confirmed with customer.
		4.4	The communication with the customer is successfully brought to a conclusion.
5.	Evaluate sales technique	5.1	Sales methods are consistent with the organization's recommended techniques.
		5.2	Time taken to complete a sale is evaluated against company standards.
6.	Identify buying signals	6.1	Listening and observation skills are effectively employed.
		6.2	Buying signals are correctly identified.
		6.3	Effort to avoid over selling is successful.

7.	Overcome customers' objections	7.1	Implied objections are accurately identified and correctly addressed.
		7.2	Expressed objections are keenly listened to and noted where appropriate.
		7.3	Requisite information for satisfying the customer's objection is correctly identified.
		7.4	Customer is made to feel at ease.
		7.5	Number of calls abandoned is minimal (within the set standards).
		7.6	Information given is disclosable and relevant to customer.
		7.7	Organization's business culture is successfully projected.
		7.8	Disposition of call is accurate
8.	Conclude terms of purchase with the customers	8.1	Stock availability is checked and reported.
		8.2	Payment mode agreed on is in accordance with company policy.
		8.3	Information necessary to process sales is elicited and accurately recorded.
		8.4	Arrangement for payment and delivery/collection of service/product is correctly arranged.
		8.5	Information is passed on to relevant department/persons.

RANGE STATEMENT

The following statements cover a wide range of circumstances. Assessment of candidates should be within the range that applies to the candidate's particular role or workplace.

Disgruntled customers include but not limited to:

- individuals who are unwilling to express their needs
- customers who have ideas and/or recommendations that may contribute to the improvement of the organization's products/services

Sales includes but not limited to:

- product/service purchase/provision
- upgrade of existing product/service
- amendments to previous sale arrangements

Payment arrangements may include but not limited to:

- cash
- payment on delivery
- direct debit
- instalments
- credit card
- cheque/cheque card
- money order

Credit card details include but not limited to:

- security checks/codes
- card type
- card holder details
- card number
- expiry date

Credit checks include but not limited to:

- automated
- sales person
- specialist staff within the enterprise

Relevant legislation, codes, regulations and standards include:

- privacy act
- trade practices act
- EEO and anti discrimination legislation
- telecommunications act
- occupational health and safety legislation

Information details:

- include that necessary to process each situation

Delivery/installation arrangements include:

- delivery address
- time of delivery
- arrangements for when householder not in attendance
- payment on delivery details

Purchase details include but not limited to:

- price
- packaging
- size
- methods of shipping
- delivery time

Buying signals include but not limited to:

- tone of voice
- questioning
- response

- freedom of information
- consumer credit code
- professional/organization ethics
- company/industry standards

-

EVIDENCE GUIDE

Competency is to be demonstrated by the ability to sell products and services in accordance with the performance criteria and the range listed within the range of variables statements

(1)   Critical Aspects of Evidence

Assessment candidates should produce evidence of the following:

- clear and precise understanding of customer needs
- matching of product/service to customer need
- prices relating to product/service offered are clearly explained and understood by the customer
- application of appropriate credit check
- arrangement of customer payment
- agreement with customer as to payment and delivery arrangements
- accurate recording of sales, payment and delivery arrangements

(2)   Pre-requisite Relationship of Units

- Nil

(3)   Underpinning Knowledge and Skills

Knowledge
Knowledge of:

- how to get others to speak freely
- techniques of selling
- the full range of the company's range of goods/services
- awareness of those products/services being used by the customer
- sales techniques used on the telephone
- the company's product(s)/service(s)
- how to access the scripts of sales techniques
- buying signals
- questioning techniques
- in-depth knowledge of the company's product/service
- interviewing techniques
- how to access the DBMS
  Procedures for processing:
- credit card payments
- cash payment
- on-line payment methods
  Arranging delivery by
- mail
- messenger
- sale of products and services (approaches)
- future pacing

Underpinning Knowledge and Skills (Cont'd)

<u>Skills</u>
The ability to:

- sell
- identify inefficacy of "old" methods and a willingness to try variations
- listen
- work well with the public
- attend to detail

(4)   Resource Implications

The following resources should be made available:

- an operational customer contact centre or a simulated contact centre with similar features
- customer contact technologies
- information technology

(5)   Method of Assessment

Competency should be assessed while work is undertaken under direct supervision with regular checks, but may include some autonomy when working as part of a team.

Competency may be assessed concurrently.

Assessment must be in accordance with the performance criteria.

(6)   Context of Assessment

Assessment should include practical demonstration either in the workplace or through simulation. This should be supported by a range of methods to assess underpinning knowledge.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1.	Level 2.	Level 3.
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSSREO0131A: Perform stock control procedures

Competency Descriptor: This unit involves the handling of stock. It includes receiving, unpacking and dispatching of goods and participating in stocktaking under supervision.

Competency Field: Retail Operations

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Receive and Process Incoming supplies	1.1	Cleanliness and orderliness in receiving bay maintained according to store policy.
	1.2	Supplies unpacked using correct techniques and equipment in line with store policy.
	1.3	Packing materials removed and disposed of promptly environmental safety practices.
	1.4	Incoming supplies accurately checked and validated against purchase orders and delivery documentation.
	1.5	Items are received, inspected and recorded.
	1.6	Stock levels accurately recorded where required.
	1.7	Secure storage of goods arranged.
	1.8	Stock dispatched to appropriate area/department.
	1.9	Stock price and code labels applied where required.
2. Rotate Stock	2.1	Stock rotation procedures carried out routinely and accurately.
	2.2	Excess stock placed in storage or disposed of in accordance with established policy/as instructed.
	2.3	Safe lifting and carrying techniques maintained.

3.	Participate in Stock take	3.1	Stocktaking and cyclical counts assisted with as required
		3.2	Stock records documentation accurately completed.
		3.3	Discrepancies in stock recorded and reported are promptly brought to the attention of relevant person.
		3.4	Electronic recording equipment operated and maintained according to manufacturer's specifications.
4.	Reorder Stock	4.1	Minimum stock levels correctly identified.
		4.2	Stock requisition forms or electronic orders completed accurately.
		4.3	Undelivered stock orders identified on stock system and followed up without undue delay.
5.	Dispatch Goods	5.1	Goods to be returned to supplier identified and labeled with date, supplier and reason for return or referred to management if required.
		5.2	Credit request documentation completed according to store procedure.
		5.3	Goods stored securely while awaiting dispatch.
		5.4	Delivery documentation completed according to established procedures.
		5.5	Special delivery instructions noted.
		5.6	Items packed safely and securely to avoid damage in transit.

RANGE STATEMENT

The following variables may be present:

- Establishments' policies and procedures in regard to stock control and dispatch.

- Manual or electronic stock recording.
- Stock takes may be cyclical or compliance driven.
- Type of equipment.
- Range of products
- Seasonal and supplier availability.
- Supplies may need to conform to established quality guidelines.
- Items received inspected for damage, quality, use-by dates, breakage or discrepancies

- Stock control may include checking incoming or existing stock and special orders.
- Stock may be moved manually or mechanically.
- Delivery procedures.
- Varying levels of staff training.
- Routine or busy conditions.

- Full-time, part-time or casual staff.
- Handling techniques may vary according to stock characteristics.

EVIDENCE GUIDE

Competency is to be demonstrated by the ability to perform stock control procedures in accordance with the performance criteria and the range listed within the range of variables statement.

(1)   Critical Aspects of Evidence

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

- consistently applying store policies and procedures in regard to stock control
- consistently applying safe work practices in the manual handling and moving of stock
- interpreting and applying manufacturers' instructions with regard to handling stock and using relevant equipment
- receiving and processing incoming goods and dispa tching outgoing goods according to store policies and procedures of establishment
- rotating stock and reordering stock/maintaining stock levels according to store policies and procedures
- assisting with stocktaking and cyclical counts according to establishm ents policies and procedures
- interpreting and processing information accurately and responsibly.

(2)   Pre-requisite Relationship of Units

- Nil

(3)   Underpinning Knowledge and Skills

Knowledge
Knowledge of:

- establishment stock control
- labelling policy
- product quality standards
- correct unpacking of goods
- stale, missing or damaged stock
- equipment used for stock handling
- stock rotation
- waste disposal
- methods of storage
- delivery documentation
- stock record documentation
- dispatch documentation
- following set routines and procedures
- use of electronic labelling/ticketing equipment/resource
- handling perishable items

Skills
The ability to:

- maintain cleanliness and orderliness in receiving bay
- unpack goods
- remove and dispose of packaging materials
- check and validate incoming stock
- receive, inspect and record items
- record stock levels
- arrange secure storage of goods
- dispatch stock
- carry out stock rotation procedures
- maintain safe lifting and carrying techniques
- assist with stocktaking and cyclical counts
- complete stock records documentation
- operate and maintain electronic recording (where applicable) equipment
- identify minimum stock levels
- complete stock requisition forms or electronic orders
- identify undelivered stock orders on stock system
- complete credit request documentation
- complete delivery documentation

(4)   Resource Implications

All resources must be provided for the assessment. If workplace based, the resources should relate specifically to store policies, procedures and range of stock and equip ment. If an off the job or simulated work environment is used then resources should be generic and be applicable to a wide variety of stores/work environments. Resources may include:

- manual/electronic labelling/ticketing equipment(where applicable)
- access to relevant equipment: (stock moving equipment)
- computers/stock recording equipment/resource
- relevant documentation, such as:

(5)   Method of Assessment

Competency is demonstrated by performance of all stated criteria according to the range of variables applicable to the workplace.

Evidence should be gathered attesting to the achievement of competence by the candidate to the standard required for each element and unit of competency.

Evidence is best gathered using the products, processes and proce dures of the individual workplace context as the means by which the candidate achieves retail industry competencies. In order to ensure consistency of performance, evidence should be collected over a set period of time that is sufficient to include dealing s with an appropriate range and variety of retail situations.

Assessment activities may also include written or verbal short answer testing, multiple choice testing, practical exercises, role -plays, research/project work or observation of practical demonstration

(6)   Context of Assessment

Elements of competency contain both theoretical and practical components. The theoretical components may be assessed off the job. The practical components should be assessed either in a work or simulated work environ ment.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1.	Level 2.	Level 3.
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBBAD0711A: **Organise the copying and collating of documents**

Competency Descriptor: This unit covers organising and completing the copying and
                              collating of documents using the appropriate media and materials.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA
1. Select appropriate media	1.1 Appropriate media and materials are identified and selected for the task.
2. Copy and collate documents	2.1 Quantities and resources are correctly estimated to complete the task.
	2.2 Documents are copied to the designated standard for presentation.
	2.3 Copies are collated in accordance with designated specifications and bound, if necessary.
	2.4 All tasks are completed within designated timelines.
3. Distribute documents	3.1 Completed documents are despatched to the nominated person/section for distribution within designated timelines.
	3.2 Distributed materials are recorded, if necessary, according to enterprise policies and procedures.
	3.3 Original documents are filed to ensure integrity and security of contents.

RANGE STATEMENT

Appropriate media and materials may include:

- colour of paper
- size, weight and thickness of paper
- texture and quality of paper
- transparencies
- cardboard
- envelopes
- folders
- brochures

Quantities and resources may include:

- number of copies required
- amount of materials required
- extra materials for back-up
- staples, paper clips
- spiral combs
- availability of photocopier/ binder and other equipment

Equipment used may include:

- printer
- photocopier
- binder
- guillotine
- franking machine
- paper folding machine

Designated standard for presentation may include:

- spiral bound copy
- cardboard folder
- single sided or double sided copying
- overhead transparencies
- electronic format
- enlarged document layout
- plastic sheet protectors
- templates/style guide according to enterprise

Designated specifications for collation may include:

- pages clipped, stapled or bound together
- materials collated in specific order
- use of photocopier sorter trays
- distribution method

Designated timelines may include:

- deadline agreed with supervisor
- deadline agreed with internal/external client
- deadline set in relation to availability of equipment
- despatch requirements

Nominated person/section may relate to:

- personal delivery
- organisation's internal mail system
- surface mail system
- post office
- courier
- internal/external client
- mail house

Filing to ensure integrity and security of documents may include:

- confidential stamp
- copy only stamp
- copy and original filed together
- documents held together securely
- storing documents in central filing system
- storing copies of documents

EVIDENCE GUIDE

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

(1)   Critical Aspects of Evidence

- Materials selected are appropriate for the task.
- Task is planned and quantities and resources, including time, are estimated correctly.
- Documents prepared are copied/printed accurately.
- Wastage of paper is minimised with the impact on the environment underpinning office administration procedures.
- Equipment is operated according to manufacturer's instructions.

- Standard of presentation is appropriate for task and is in accordance with enterprise policies and procedures.
- Documents are copied and collated within designated enterprise timelines.
- Collated material is checked before distribution to ensure materials have been collated correctly.
- Original materials are filed in correct location and sequence according to enterprise policies and procedures.

(2)   Pre-requisite Relationship of Units

- BSBBAD0031A   Use business equipment

(3)   Underpinning Knowledge and Skills

<u>Knowledge</u>
Knowledge of:

- enterprise policies and procedures
- relevant legislation (e.g. copyright)
- instructions (e.g. manufacturer's guidelines, procedural manual, training notes)
- functions of copying, collating, binding and other equipment

<u>Skills</u>
The ability to:

- read and understand enterprise policies and procedures
- follow sequenced instructions regarding document presentation; interpret instructions which combine pictorial and written information
- use basic mathematical knowledge; collate file documents
- listen to short, explicit instructions regarding document preparation; performs a series of routine tasks given clear directions; ask questions to clarify information
- select appropriate functions
- use a range functions of the photocopier

(4)   Resource Implications

The assessor must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- workplace manuals and reference materials such as equipment user manuals, company policy, procedural manuals
- photocopier
- equipment (e.g. printer, computer, binder, franking machine)
- materials (e.g. paper, card, envelopes)
- filing system

(5)   Method of Assessment

Competency should be assessed while work is being done under direct supervision with regular checks, but may take the form of some autonomy when working as part of a team, in order to achieve outcomes within time.

Evidence gathering methods may include:

- demonstration
- questioning
- workplace performance
- role-play
- projects/assignment
- written tests (verbal usage and verbal comprehension)
- portfolio of work documents
- third party reports

(6)   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 (traineeship) arrangement
- use of a practice firm or simulated work environment
- flexible delivery methods used by training providers to cater for distance education students
- recognition of prior learning, recognition of current competencies (in skill areas where there has been no significant change to work practice in recent times).

CRITICAL EMPLOYABILITY SKILLS

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Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBBAD0212A: Process mail

Competency 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.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA
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 are 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:

Sorting mail may include:

- separating urgent mail to be distributed first
- sorting by departments
- sorting by location
- sorting by seniority of personnel
- separating internal (organisational) mail and external mail
- separating by order of importance for each individual
- separating junk mail

Delivery of urgent and confidential mail may include:

- separating and prioritising urgent mail immediate, hand delivery, express post, and registered mail
- urgent and same day deliveries

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

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)

The firm's policies and procedures may include:

- security procedures
- mail register
- confidential mail procedures
- delivery/despatch of urgent mail

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

Nominated person/location may include:

- department
- individual addressee
- administrative support person
- sorting invoices, cheques and accounts
- adding a circulation slip

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

Mail records may include:

- electronic systems (specialist software, database, spreadsheet)
- paper based (mail book, form, file)

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

Checking electronic or paper based mail for accuracy may include:

- spelling
- grammar
- punctuation
- intended meaning
- addressee

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

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

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

Delivery options may include:

- express mail
- overnight bag
- courier

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

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

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

- demonstration of all elements of competency and their performance criteria
- knowledge of the organisation's policies and procedures relating to mail and electronic mail
- justification for choice of carrier for urgent and same day deliveries
- knowledge of carriers' requirements (e.g. postal and courier)

(2)   Pre-requisite Relationship of Units

- Nil

(3)   Underpinning Knowledge and Skills

Knowledge
Knowledge of:

- 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
- the organisational structure
- titles, roles and locations of the organisation's personnel
- range of mail services available
- procedural requirements for receiving/despatching and prioritising correspondence
- organisational policies and procedures that are specific to handling electronic mail

Skills
The ability to:

- keep records, check accuracy of written material and follow policies and procedures
- check for weights and addresses; sort, collate and estimate time for mail despatches and bulk mail outs
- receive instructions of several steps to complete task, give information to others and consult with or question supervisor and peers to clarify information
- use electronic mail
- solve problems e.g. choose appropriate delivery method for urgent documents
- relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities

(4)   Resource Implications

The learner and trainer must have access to appropriate documentation and resources normally found in the work environment and required to allow the job or task to be properly performed. These may include:

- appropriate legislation and regulations relevant to assisting clients, conducting searches and using trust account money
- workplace manuals and reference materials such as company policy, procedural manuals and checklists
- sample search forms from a variety of agencies
- appropriate technology such as computers with relevant software and connections

(5)   Method of Assessment

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

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

(6)   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 key competencies and the Business Services Common Competencies for the particular NVQ - J Level. Refer to the Critical Employability Skills at the end of this unit .

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NC TVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
Carries out established processes Makes judgement of quality using given criteria	Manages process Selects the criteria for the evaluation process	Establishes principles and procedures Evaluates and reshapes process Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBBAD0612A: **Perform Cashiering**

Competency Descriptor: This unit deals with the recording, planning, monitoring and reporting on the financial activities in the exchanging of goods and services for monetary reward in an enterprise/organization.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Prepare and maintain cash summary	1.1	Payments are accurately balanced and verified against receipts issued.
	1.2	Relevant information is accurately recorded in the appropriate format.
	1.3	All entries are legible and clear.
	1.4	Entries are made promptly.
2. Exercise care in receipt of cash transaction and security	2.1	Cash summary is correctly totalled and balanced at the end of each period.
	2.2	Cash summary and supporting documents are carefully filed in accordance with company policy.
	2.3	Security measures for cash handling and confidentiality procedures are implemented.
	2.4	The amount of cash counted is compared to that listed as received.
3. Reconcile daily cash transactions	3.1	Cashier report concurs with total cash submitted.
	3.2	Discrepancies are identified and appropriately resolved or referred to the relevant person.
4. Balance cash and prepare bank lodgement	4.1	Cash is counted and organised into sets of similar notes and coins.
	4.2	The number in each category is accurately recorded.
	4.3	Cash and cash equivalent instruments are accurately accounted for.
	4.4	Banking is done on a daily basis or in accordance with company policy.
	4.5	All relevant details are accurately recorded on lodgement slip.

5.   Handle petty cash

5.1   Petty cash float is requested and maintained within the limits specified by the in-house policy.

5.2   Petty cash expenditures are properly authorised and signature is obtained when issuing cash.

5.3   Petty cash records are maintained according to standard accounting practice and within established company procedures.

5.4   Records are accurate, neatly kept and up-to-date

5.5   Petty cash statements are accurately prepared for reimbursement, accompanied by supporting documents

5.6   Petty cash is requested in a timely manner so that the fund is never completely depleted.

RANGE STATEMENT

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

Work activities include:

- balance and verify payments against receipts issued
- record information in the appropriate format
- total and balance cash summary
- implement security and confidentiality procedures
- applying accounting techniques
- maintain petty cash float
- prepare petty cash statements
- prepare vouchers and receipts

Payments include but are not limited to:

- cash
- cheque
- credit cards
- debit cards
- postal order
- local currency
- foreign currencies

Records include:

- cashbook
- ledgers, cashier reports
- receipts
- paying-in slips
- invoices
- account references

Petty Cash includes:

- departmental petty cash
- company petty cash
- employer's personal petty cash

Relevant information:

- Include details of relevant source documents (receipts, cheques, credit card payment slips, cash summaries).

Petty cash statement:

- columnar statement showing allocation of expenditure between different categories

EVIDENCE GUIDE

The evidence guide identifies the critical aspects, underpinning 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

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

- demonstrate compliance with occupational health and safety regulations applicable to workplace
- indicate compliance with organizational policies and procedures
- demonstration of follow-through in relation to performance management issues to bring about a satisfactory conclusion
- follow a clear direction stipulated under the provision of accounting services with a structured quality assurance system
- interactively communicate with others to ensure safe and effective work procedures
- apply organizational quality procedures and processes within the context of performing cashier functions

(2)   Pre-requisite Relationship of Units

- BSBFIN0721A   Prepare routine financial documents
- BSBCOR0171A   Deliver quality customer service

(3)   Underpinning Knowledge and Skills

Knowledge
Knowledge of:

- relevant legislation from all government agencies that affect business operations, especially in regard to Occupational health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- the organization's policy and procedures for customer service including handling customer complaints
- operation of computerized cash register and relevant Bar Code procedure

Skills
The ability to:

- to access and use workplace information
- select and use technology skills at the appropriate level
- interpret skills to relate to people from a range of social, cultural ethnic backgrounds and physical and mental abilities

(4)   Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace in the administration of duties.

(5)   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 maybe 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.

(6)   Context of Assessment

Competency is to be 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 should reinforce the integration of the Critical Employability Skills and the Business Competency Standards for the particular NVQ-J level. Refer to the Critical Employability levels at the end of this unit.

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

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

Collecting, analysing and organising ideas and information	Level 1	
Communicating ideas and information	Level 1	
Planning and organising activities	Level 1	
Working with others and in teams	Level 1	
Use mathematical ideas & techniques	Level 2	
Solve problems	Level 1	
Using technology	Level 2	

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBSBM0012A: Craft personal entrepreneurial strategy

Competency Descriptor:

This unit deals with the skills and knowledge required to craft an entrepreneurial strategy that fits with the attitudes, behaviours, management competencies and experience necessary for entrepreneurs to meet the requirements and demands of a specific opportunity.

Competency Field: Small Business Operations

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Demonstrate knowledge of the nature of entrepreneurship	1.1	Concepts associated with entrepreneurship are clearly defined.
	1.2	Factors which influence entrepreneurship in and outside of Jamaica are correctly identified and explained.
	1.3	The importance of entrepreneurship to economic development and employment is explained clearly.
	1.4	The findings of research conducted on entrepreneurial ventures and successes in the Caribbean region are clearly presented in an appropriate format.
	1.5	Differences between wage employment and entrepreneurial ventures are correctly stated.
2. Identify and assess entrepreneurial characteristics	2.1	Relevant research is carried out and required entrepreneurial characteristics identified.
	2.2	Entrepreneurial characteristics identified are assessed and ranked.
	2.3	An understanding of the process and discipline that enable an individual to evaluate and shape choices and to initiate effective action is correctly demonstrated.
	2.4	Factors that will help an entrepreneur to manage the risk and uncertainties of the future, while maintaining a future orientated frame of mind, are identified.

3.	Develop self-assessment profile	3.1	Self-assessment tools/methods to identify personal entrepreneurial potential are identified and properly used.
		3.2	The ability to apply creativity, problem-solving techniques and principles to solve business related problems are demonstrated.
		3.3	Feedback from others for the purpose of becoming aware of blind spots and for reinforcing or changing existing perceptions of strengths/ weaknesses is appropriately obtained.
4.	Craft an entrepreneurial strategy	4.1	A profile of the past that includes accomplishments and preferences in terms of life and work styles, coupled with a look into the future and an identification of what one would like to do is developed.
		4.2	Commitment, determination and perseverance; orientation towards goals; taking initiative and accepting personal responsibility; recognizing management competencies and identifying areas for development are determined.
		4.3	Written guidelines to obtain feedback that is solicited, honest, straightforward, and helpful but not all positive or negative are developed to facilitate reviews.
		4.4	Framework and process for setting goals which demand time, self-discipline, commitment, dedication and practice are developed.
		4.5	Goals established are specific and concrete, measurable, relate to time, realistic and attainable.
		4.6	Priorities, including identifying conflicts and trade-offs and how these may be resolved are established.
		4.7	Potential problems, obstacles and risks in meeting goals are identified.
		4.8	Specified action steps that are to be performed in order to accomplish goals are identified.
		4.9	The method by which results will be measured is indicated.

4.10   Milestones for reviewing progress and tying these to specific
       dates on a calendar are established.

4.11   Sources of help to obtain resources are identified.

4.12   Evidence of the ability to review process and periodically
       revise goals is demonstrated.

RANGE STATEMENT

At this stage of the entrepreneurial process the entrepreneur must be able to conduct a self-assessment profile, examine the frame work for self assessment, develop a personal entrepreneurial strategy, identify data to be collected in the self-assessment process and learn about receiving feedback and setting goals.

Concepts associated to include:

- risk
- entrepreneurship
- macro-screening
- micro-screening
- competition
- wage employment

Influencing factors to include:

- market conditions
- markets – demand/supply
- global trends
- level of economic activities
- funding
- economic stability
- social stability
- resources availability

The entrepreneur must be able to:

- understand the extreme complexity in predicting or aligning him/herself to specific careers in an environment of constant change
- determine the kind of entrepreneur he or she wants to become based on attitudes, behaviours, competencies, experience and how these fit with the requirements and demands for a specific opportunity
- evaluate thoroughly his or her attraction to entrepreneurship
- effectively develop personal plan
- utilize available information that will enhance his or her ability to achieve success

The entrepreneur may encounter setbacks if the planning process is not effectively pursued.

Pitfalls may include:

- proceeding without effective planning which may result in commitment to uncertainty
- commitment to a premature path with the desirability of flexibility can lead to disaster
- personal plans fail for the same reasons as business plans including frustration if the plan appears not to be working immediately and the challenges of changing behaviour from an activity-oriented routine to one that is goal oriented
- developing plans that fail to anticipate obstacles, and those that lack progress milestones and reviews

EVIDENCE GUIDE

Competency is to be demonstrated when the entrepreneur is able to undertake a personal entrepreneurial assessment exercise to determine if he or she possesses the necessary credentials to be a successful entrepreneur. This stage of the entrepreneurial process is critical since experience has shown that the founder is one of the deciding forces if the venture is to succeed and prosper.

(1)   Critical Aspects of Evidence

The entrepreneur will be assessed by his/her action in developing an orchestrated plan in order to effectively pursue the business concept.

(2)   Pre-requisite Relationship of Units

- Nil

(3)   Underpinning Knowledge and Skills

Knowledge   Skills
Knowledge of: The ability to:

- personal entrepreneurial profile systems
- effective management systems:
  marketing, operations/productions,
  finance, administration, law
- how to measure feedback
- the method of developing a personal
  plan
  and a business plan
- understanding the difference between
  entrepreneurial culture and
  management culture

- determine barriers to entrepreneurship
- minimize exposure to risk
- exploit any available resource pool
- tailor reward systems to meet a particular
  situation
- effectively plan and execute activities
- use computer technology to undertake
  assessments

(4)   Resource Implications

The following resources should be made available:

Personal computer with access to the internet and appropriate software that will enable one to
conduct the necessary analysis using the internet

(5)   Method of Assessment

A useful method of assessment is to determine if the venture can stand up to the test of critical
evaluation.

(6)   Context of Assessment

This stage of the entrepreneurial process is assessed when comparisons are made between
actual outcomes and plans/projections.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBBAD0732A   **Record, store and supply information using a paper – based filing system**

Competency Descriptor: This unit covers use of a paper-based filing system to update files and supply information.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Record and store information	1.1	Information is always recorded accurately.
	1.2	Information is kept safe, organized and correctly placed using established procedures.
	1.3	New files are created, to established procedures.
	1.4	Information is stored within the agreed timeframe.
	1.5	Updated records show the information correctly stored.
	1.6	Problems identified with the system are reported promptly
	1.7	All confidential information is treated correctly in accordance with policy and procedure.
2. Retrieve and supply information	2.1	Information requested is located using established procedures.
	2.2	Information removed is clearly and accurately documented and indicates who has received it.
	2.3	Files and contents are kept safely organized.
	2.4	Problems with any file are identified and reported according to established procedures.
	2.5	Requested information is delivered on time and in format requested.
	2.6	Alternatives are suggested where information requested does not match requirements indicated.

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 presented for this unit.

Organizational Policy:

- disclosure of information
- storage of information
- issuing information
- approval processes to obtain access to systems
- creating new files
- reference systems
- coding of material
- retrieval
- document tracking procedures
- reporting missing items
- system improvement
- reporting problems

Legislation, codes and standards to include:

- industry code of practices
- procedure for handling files
- handing confidential materials
- information Act – 2002
- using filing systems
- disposal of records
- data protection regulations/requirements

Filing systems to include:

- alphabetical
- numerical
- chronological
- alphanumeric
- uses of indexes

Treating confidential information to include:

- how to handle files correctly
- procedures for storage
- approval for disclosure

Reporting problems to include those which are:

- system related
- policy related

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 competing and should be read in conjunction with the Range Statement.

(1)   Critical Aspects of Evidence

- record and store information
- retrieve and supply information
- interpretation of legislation
- standards and procedure
- use of paper based filing system
- handling confidential information
- handling missing files

(2)   Pre-requisite Relationship of Units

- BSBBAD0681A   Locate and store files in paper based system
- BSBCOR0031A   Apply basic communication skills

(3)   Underpinning Knowledge and Skills

Knowledge
Knowledge of:

Procedures for:

- cross – referencing
- opening new files
- reporting and finding missing items
- removing files and recording files removed

Importance of:

- identifying problems with filing system
- making suggestions for system improvement
- company having an effective and efficient filing system
- legislation or standards in the use of filing system and disclosure of information
- importance of information in an organization
- use of the various methods of filing and their importance
- keeping contents of file without unnecessary delays

Skills
The ability to:

use the following:

- established filing procedures
- alphabetical
- numerical
- alphanumerical
- chronological
- record information in existing files
- create new files
- cross referencing
- use indexes
- tracking and locate loss files

(4)   Resource Implications

Resources to be available should normally relate to those used in the workplace, these may include the following:

- organization procedure manual and policy documents
- relevant legislations and standards
- paper based filing system
- storage facilities
- recording materials
- stationery appropriate to the task of the unit

(5)   Method of Assessment

Competency should be assessed while tasks are undertaken.

Assessment should involve:

- Observation of work processes and
- Questioning related to underpinning knowledge

(6)   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 skills. Refer to the Critical Employability Skills at the end of this unit.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBBAD0742A: **Reproduce, present and distribute complex documents**

Competency Descriptor: This unit covers reproduction and binding of documents, including complex ones that multi-page, require double-sided reproduction, enlarging or reducing according to requirements.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Reproduce documents	1.1	Clear information is obtained on what is to be reproduced and the required format.
	1.2	Adequate materials for the job is in place and organisation procedures followed.
	1.3	Reprographic machines/equipment are used according to manufacturers/organisations procedures to carry out the job efficiently.
	1.4	Correct numbers of copies are produced to the required standards and format.
	1.5	Waste of material is minimised in doing the job.
	1.6	Manufacturer's instructions are followed for dealing with problems outside the scope of responsibility.
	1.7	Problems outside scope of responsibility are reported to relevant persons.
	1.8	All records are correctly completed.
2. Present and distribute documents	2.1	Clear information in the presentation and distribution of document(s) is obtained.
	2.2	Copies are collated in the right order and are in the right way.
	2.3	Covers are selected and prepared as requested.
	2.4	Alterations are made as indicated and the final document meets the approval of the client.
	2.5	Documents are binded neatly, securely and should meet the requirements of the client.
3. Handle originals	3.1	Originals are handled according to organisation's procedures or client's requirements.
	3.2	Originals on completion of the job are maintained in their initial condition and are returned to source with copies requested.

3.3   If originals not required to be returned to source; then they should be kept and stored for a period established by the organisation's policy.

RANGE STATEMENT

Competent performance of the criteria must be demonstrated in the context of this unit allowing the differences between enterprises and workplaces. In addition the following variables may be present for this particular unit.

Legislation and company policies covering:

- copyright
- intellectual property rights
- what can or cannot be copied
- confidential and sensitive information

Manufacturer's requirements covering:

- use of reprographic machines
- maintenance procedures
- handling problems

Reprographic equipment/machines to include:

- photocopiers
- facsimile
- stencilling machines
- computer printers

Organisation's procedures to include:

- authorization for copying
- reporting problems with machines
- handling original documents
- maintenance of equipment/machines

Insulation received:

- from supervisor
- internal client
- external client

Methods for:

- binding documents
- collating documents
- checking quality

EVIDENCE GUIDE

The Evidence Guide identifies the critical aspects, underpinning 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

- application and/or observation of copyright requirements, organisation policy on the handling of confidential and sensitive information
- adhering to procedures for using reprographic equipment and handling related problems
- economic use of materials and quality of work produced
- handling problems related to reproduction of documents
- handling original documents on completion of binding methods
- procedures for distributing copied documents

(2)   Pre-requisite Relationship of Units

- Use business equipment

(3)   Underpinning Knowledge and Skills

Knowledge
Knowledge of:

- copyright and intellectual property rights legislation
- types of reprographic equipment
- types of binders
- importance of confidentiality of information
- importance of quality
- authorisation procedures
- records to be maintained
    - maintenance
    - copies produced
    - materials used
- handling problems associated with using copying machines
- importance of minimizing waste
- procedures for collating documents
- selecting appropriate covers and binders for document

Bind materials in the following ways:

- ring binders
- spiral binders
- slide binders
- quality check document
- distribute copies

Skills
The ability to:

- prepare, copy document for reproduction
- reproduce (simple and complex documents i.e. multi-page

Make the following photocopies:

- single pages
- multi-page
- enlarged
- reduced
- single-sided
- double-sided

Deal with the following problems:

- machine out of toner or ink
- machine out of paper
- paper jam inside machine
- original incorrectly positioned
- original damaged
- collage materials

(4)   Resource Implications

The following resources should be made available or accessible:

- relevant legislation on copyrights and /or intellectual property rights
- organisation's policy and procedures manual
- manufacturers manual for reproduction/copying equipment
- reprographic equipment/machines – photocopier, computer printer, (stencilling machine where applicable/available), facsimile machine
- paper punch, stapler
- binders (e.g. ring binders, spiral binders, slide binders)
- spiral binding equipment
- personal computer (with printers)

(5)   Method of Assessment

Competency should be assessed while work is being done under general direction with periodic checks at the various stages of the process and at the completion of the activity against performance criteria and specifications.

(6)   Context of Assessment

Competency should be assessed in the workplace or simulated workplace environment in accordance with work practice and safety policy.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBBAD0632A: **Maintain and issue stock items**

Competency 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.

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Maintain stock levels	1.1	Stocks are always maintained to the levels required or established.
	1.2	Stocks are handled safely and stored securely according to organisation procedures.
	1.3	Stock conditions are maintained in keeping with manufacturer's requirements and organisation's policy.
2. Carry out stock takes	2.1	Stock takes are conducted as instructed.
	2.2	Problems identified are reported promptly to relevant persons.
	2.3	Records are accurately and correctly documented.
3. Make and follow-up orders	3.1	Stocks are ordered from sources (suppliers) and all necessary documentation correctly completed.
	3.2	Appropriate authorization for order is obtained.
	3.3	Orders are confirmed up with supplier and agreed delivery time is met.
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 to relevant person following organisation procedures.
	5.2	Accurate, legible and updated records are kept of stocks issued.
	5.3	Unwanted or obsolescent stocks are disposed of safely and in accordance with organisation'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 are maintained to established policy procedures.

6.2 Incorrect records are adjusted according to established procedures and authorization level.

RANGE STATEMENT

Competent performance of the criteria must be demonstrated in the context of this unit allowing for the differences between enterprise and workplaces. In addition the following variables may be present for this unit.

Use of supply sources:

- internal supply sources
- external supply sources
- identification of suppliers
- approved suppliers used by the organisation

Demand levels:

- current level of demand for stock
- factors affecting future levels of demand
- stock level maintained
- reorder level and reorder quantity

Storage and disposal:

- methods of storage
- security and safety procedures
- handling procedures
- disposal procedures and policy
- correct methods of disposal of stock items

Issuing of stock to include:

- process for issuing individual team(s) or department
- external person (to department)
- receipts required for items issued (where applicable)
- source of origin of the principal documents identified

Handling problems:

- types of problems linked with deliveries
- types pf problems linked with issuing of stock
- procedures to handle, correct or report problems

Record keeping methods:

- methods of maintaining and updating records
- period of stock takes
- importance of accurate and legible records

Legal requirement:

- environment regulations for disposal
- safety requirements for disposal and retention

Procedures for ordering stock:

- from internal supplier(s)
- from external suppliers(s)
- identification of any differences in ordering procedures for external and internal supplier(s)

Completing documentation to include:

- purchase requisition
- delivery invoice
- stock cards
- inventory records

Purchase of stock/goods:

- processes for purchase from suppliers
- principal documents used in the transaction

EVIDENCE GUIDE

The evidence guide identified the critical aspects, underpinning knowledge and skills to be demonstrated to confirm competence for this unit. This is an integral part of the assessment of competence and should be read in conjunction with the range statement.

(1)   Critical Aspects of Evidence

(2)   Pre-requisite Relationship of Units

- BSSREO0131A   Perform stock control procedure

(3)   Underpinning Knowledge and Skills

Knowledge
Knowledge of:

- reorder levels
- requirements for ordering, storing, taking delivery, issuing and disposing of stocks
- problems associated with deliveries and stock items
- how to handle and correct problems
- methods of maintaining up-to-date, accurate and legible records
- types of documents used and their importance
- differentiating between trade and cash discounts
- stock control procedures
- stock control cards
- storage facility for stationery
- meaning of terms:
- First-in-First-Out
- Last-in-Last Out (LILO)

Skills
The ability to:

- order and check stock from external and internal suppliers
- maintain stock records
- maintain stock level established
- calculate reorder levels/or quantity
- identify and handle problems
- carry out stock takes
- dispose of unwanted stock
- complete requisition and stock control cards
- use computer-based stock control software where applicable
- calculate trade and cash discounts
- issue stock/stationery on request

(4)   Resource Implications

Resources may include:

- relevant procedures for handling of stocks
- relevant documentation used including requisition forms, stock cards, purchase order forms, receptionist books, order forms,
- stock control software (where applicable or appropriate)
- stationery cabinets
- procedures for stocktaking and reporting
- available stock items (where applicable)

(5)   Method of Assessment

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

(6)   Context of Assessment

Competency should be assessed in the workplace or simulated workplace environment in accordance with workplace practice and safety procedures.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBBAD0762A: Co- ordinate mail service

Competency Descriptor:

> This unit covers the handling of incoming and outgoing mail for an organization or department. This unit relates to the job of persons working in a registry or mailroom.

Competency Field: Business Administration

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
1. Receive and sort mail	1.1	Correct procedures are followed for receiving incoming mail.
	1.2	Correct procedures are followed for sorting and recording incoming mail.
	1.3	Damaged and or suspicious items are clearly identified and reported to the relevant person immediately.
2. Distribute mail	2.1	Correct procedures for distributing incoming mail are followed.
	2.2	Mail is sent to the right person promptly or within timeframe established.
	2.3	Confidential and urgent mail is handled correctly.
	2.4	Delays in mail distribution are reported to, and explanation given to the relevant person and a time for delivery agreed.
3. Dispatch mail	3.1	Correct procedures are followed for displaying mail to its destination.
	3.2	Mail is checked to ensure it contains all items to be mailed.
	3.3	Mail is securely sealed and items protected form accidental damage.
	3.4	Mail is checked ti verify that it is addressed to meet postal service and organizations requirements.
	3.5	The most appropriate service is selected according t the type of mail requested.
	3.6	Mail is stamped or franked correct and is dispatched at the time requested.
	3.7	Problems are reported immediately to relevant persons.

RANGE STATEMENT

The statement provided advice to interpret the scope and context of this unit of competency, allowing for differences between enterprises and workplaces. It related to the unit as a whole and facilities holistic for the particular unit.

Handling mail to include:

- suspicious items
- damages items
- bulk items
- confidential items
- urgent items
- weighing outgoing mail
- calculating charges
- valuable items

Mail services procedures:

- organizational procedures postal services
- handling mail for international destination
- sorting and recording incoming mail
- sorting and recording outgoing mail
- reporting delays
- dispatching items
- use of frank machine

Relevant persons to:

- supervisor
- manager
- security persons where applicable
- sender of mail
- persons to receive mail

Identification of types of mail:

- internal
- external
- parcel
- letters

Identifying types of:

- Stamps for
  - local mail
  - international

EVIDENCE GUIDE

The evidence guide identifies the critical aspect knowledge and skills to be demonstrated to confirm competency for this unit. This an interpret part of the assessment of competency and should be read in conjunction with the range Statement

(1)   Critical Aspects of Evidence

- use of the established procedures
- sorting and recording incoming mail
- distributing incoming mail
- handling confidential mail
- reporting delays
- dispatching mail
- using appropriate mail services
- determining charges for mail
- applying correct postage stamps

(2)   Pre-requisite Relationship of Units

- BSBBAD0212A   Process mail

(3)   Underpinning Knowledge and Skills

Knowledge
Knowledge of:

- postal service regulations/legislation
- types of mail services available
- correct procedures for:
  - receiving and disputing internal and external mail
  - handling confidential mail
  - directing mail to correct person
  - reporting delays
  - suspicious and damaged items
  - handling urgent mail
- importance of meeting deadlines
- importance of identifying and reporting damaged or suspicious items
- importance of checking for missing items
- importance of sealing and securing all mail
- identifying services for urgent mail and mail containing valuable and important items
- addressing mail:
  - organization's requirements
  - postal service requirements
- Procedures for packing items to avoid damage choosing appropriate postal charges for items of different weights use of franking machine

Skills
The ability to:

- receive, sort and distribute all of the following types of mail:-
  - internal
  - external
  - parcels
  - letters
- weight and calculate charges for mail
- use franking machines (where applicable)
- dispatch the following types of mail going to both internal and external:
  - envelopes
  - routine
  - urgent
  - confidential
  - mail containing valuable items
- use available services to include:
  - couriers
  - messengers
  - shipping agents
  - postal

(4)   Resource Implications

Resources to be available to include the following:

- policy manual of organization
- regulations of postal services
- franking machines (where applicable)
- letter holders
- stamps
- received books
- lost of postal zone
- postal rates
- stamping tools (urgent, by hand, etc.)

(5)   Method of Assessment

Competency should be assessed while task are undertaken. Assessment should involve observation of work processes, and questioning related to underpinning knowledge.

Assess maybe by intermittent checking at various stages of each task application or at the completion of each task in accordance with the performance criteria.

(6)   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 skills.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1.	Level 2.	Level 3.
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSSREO0142A: **Maintain stock control**

Competency Descriptor: This unit requires a level of competency involving the responsibility
                          for ensuring that staff receive and dispatch goods and count stock, and
                          for monitoring and maintaining stock records.

Competency Field: Retail Operations

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA
1. Monitor receipt and dispatch of goods	1.1 Responsibility for receipt and dispatch of goods delegated to appropriate staff.
	1.2 Store procedures implemented in regard to receipt, dispatch and secure storage of goods.
	1.3 Staff functions observed to ensure store procedures are followed and documentation is completed correctly.
	1.4 Variations to quantity and quality of delivered goods acted upon according to store policy.
	1.5 Safe handling and storage of goods supervised in line with store policy.
2. Maintain stock records	2.1 Stock levels monitored and maintained at required levels.
	2.2 Stock reorder cycles maintained, monitored and adjusted as required.
	2.3 Team members informed of their individual responsibilities in regard to recording of stock.
	2.4 Stock storage and movement records maintained in line with store policy.
	2.5 Stock discrepancies recorded and procedures followed according to store policy.
	2.6 Stock performance monitored and fast/slow-selling items identified and reported according to store policy.

3.	Co-ordinate stocktaking/cyclical count	3.1	Policies and procedures in regard to stocktaking and cyclical counts interpreted and explained to team members.
		3.2	Staff rostered according to allocated budget and time constraints.
		3.3	Stocktaking tasks allocated to individual team members.
		3.4	Team members provided with clear directions for the performance of each task.
		3.5	Team members allocated to ensure effective use of staff resources to complete task.
		3.6	Accurate reports on stock take data, including discrepancies, produced for management.
4.	Identify Stock Losses	4.1	Losses accurately identified, recorded and assessed against potential loss forecast on a regular basis.
		4.2	Avoidable losses identified and reasons established.
		4.3	Possible solutions recommended and implemented.

RANGE STATEMENT

The following variables may be present:

- store policies and procedures in regard to stock control
- size, type and location of store
- store merchandise and product range
- seasonal and supplier availability
- handling techniques may vary according to stock characteristics and industry codes of practice
- store stock control system
- range of responsibilities/job description
- budget and time constraints
- type of equipment used
- stock recording systems may be manual or electronic
- stock transfers may involve inter and intra store/department
- procedures for investigating discrepancies
- levels of staffing, e.g. staff shortages
- varying levels of staff training
- routine or busy trading conditions
- full-time, part-time or casual staff

EVIDENCE GUIDE

Competency is to be demonstrated by the ability to perform stock control procedures in accordance with the performance criteria and the range listed within the range of variables statement.

(1)   Critical Aspects of Evidence

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

- consistently implementing and monitoring store policy/procedures regarding receipt, dispatch and secure storage of goods
- regular monitoring of staff implementation of store procedures and documentation in regard to receipt, dispatch and secure storage of goods
- monitoring stock levels, storage, movement and reorder cycles on a regular basis
- organising and co-ordinating stock take, according to store policy and procedures

(2)   Pre-requisite Relationship of Units

- BSSREO0131A   Perform stock control procedures

(3)   Underpinning Knowledge and Skills

Knowledge   Skills
Knowledge of: The ability to:

- stock control   - ensure store procedures are followed
- store merchandising system: - monitor receipt and dispatch of goods
    - bar codes   - monitor and maintain stock levels
    - labels   - monitor and maintain stock reorder cycles
    - price tags   - monitor stock reorder cycles
- store stock recording system   - record stock discrepancies
- stock replenishment/reorder procedures   - monitor stock performance
- inter and intra store/department   - co-ordinate stocktaking/cyclical count
  transfers   Identify stock losses
- reporting of stock
  discrepancies/damage
- identifying and recording stock losses
- identifying and recording discrepancies
- receipt and dispatch of goods including
  inspection for quality and quantity
- store stocktaking systems
- use of electronic recording equipment
  where relevant
- giving feedback
- coaching
- performance analysis
- questioning/listening/observation
- group presentation
- team motivation
- negotiation
- time management
- verbal and non-verbal communication
- team leadership

(4)   Resource Implications

Resources must reflect the particular simulated or actual work environment. The resources
should relate specifically to store policies, procedures and range of stock and equipment.
Resources may include.

Relevant documentation, such as:

- store policy and procedures for receipt and dispatch of goods
- store procedures for stock take

(5)   Method of Assessment

The candidate should gather evidence attesting to the achievement of competence to the standard required for each element and unit of competency.

Evidence is best gathered using the products, processes and procedures of the individual workplace context as the means by which the candidate achieves retail industry competencies. In order to ensure 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 retail situations.

Assessment activities may also include written or verbal short answer testing, multiple choice testing, practical exercises, role plays, research/project work or observation of practical demonstration.

(6)   Context of Assessment

Elements of competency contain both theoretical and practical components. The theoretical components may be assessed off the job. The practical components should be assessed in a work environment.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

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

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.

BSBCOR0382A   Display human relations skills

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

Competency Field: Business Administration Services

ELEMENT OF COMPETENCY	PERFORMANCE CRITERIA	
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

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

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

Working environment to include:

- Seating facilities such as swivel chairs, stools, benches and floorings such as carpeted floors, wooden floors, concrete floors, tiled floors

Persons to include:

- peers
- supervisors
- clients/customers
- general public

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 or rules relating to employee behaviour/conduct with other employees or customers

Communication:

- oral
- written
- non-verbal

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:

- compliance with occupational health and safety regulations applicable to workplace and human relations skills techniques
- indicate compliance with organizational policies and procedures
- demonstration of follow-through in relation to performance management issues to bring about a satisfactory conclusion
- follow a clear direction stipulated under the provision of human resource services with a structured quality assurance system
- interactively communicate with others to ensure safe and effective work procedures
- apply organizational quality procedures and processes within the context of displaying human relations skills

(2)   Pre-requisite Relationship of Units

- BSBBAD0041A   Develop professionalism

(3)   Underpinning Knowledge and Skills

Knowledge   Skills
Knowledge of: The ability to:

- 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
- organisational human resource policies and procedures
- quality assurance concepts
- counselling/discipline procedures
- the principles and techniques associated with:
    - accountability to head of team/supervisor
    - forms of bias/discrimination and how to deal with them

- access and use workplace information
- relate to people from a range of social, cultural ethnic backgrounds and physical and mental abilities
- facilitate the participation of team members to ensure input from relevant groups and individuals for the specification of human resource services
- ensure that human resource services meets client expectations/specifications (evaluation skills)

(4)   Resource Implications

The learner and trainer should have access to appropriate documentation and resources normally used in the workplace in the administration of duties.

(5)   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.

(6)   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 NVQ-J Level. Refer to the Critical Employability at the end of this unit.

CRITICAL EMPLOYABILITY SKILLS

Three levels of performance denote level of competency required to perform a task. These levels do not relate to the NCTVET Qualifications Framework. They relate to the seven areas of generic competency that underpin effective workplace practices.

Levels of Competency		
Level 1	Level 2	Level 3
• Carries out established processes • Makes judgement of quality using given criteria	• Manages process • Selects the criteria for the evaluation process	• Establishes principles and procedures • Evaluates and reshapes process • Establishes criteria for evaluation

Collecting, analysing and organising ideas and information	Level 2	
Communicating ideas and information	Level 2	
Planning and organising activities	Level 2	
Working with others and in teams	Level 2	
Use mathematical ideas & techniques	Level 1	
Solve problems	Level 2	
Using technology	Level 1	

Please refer to the Assessment Guidelines for advice on how to use the Critical Employability Skills.