Skills First
Recognition of Prior Learning

BSB30101 Certificate III in Business
BSB30201 Certificate III in Business Administration
Version 2: November 2007

RPL Assessor Kit

Queensland the Smart State

Queensland Government
Department of Education, Training and the Arts

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Acknowledgments

Suzanne Manwill	CEO, Orion Training and Performance Management
Fiona Ryan	FLR Training Solutions

Notes

This version was developed from BSB01 (Version 4) released in October 2004.

This RPL Assessor Kit is available free of charge at www.resourcegenerator.gov.au

The Australian Government has contributed to funding this material under the COAG RPL Programme.

**The Department of Education, Training and the Arts considers any enhancement which amounts to a modification of 10% or more of the material, to be significant.

HOW TO USE THIS RPL ASSESSOR KIT

This RPL Assessor Kit is divided into sections to allow you to easily access only those sections you require at any given time. These sections are:

SECTION A – Assessor Information

You need to read this information before conducting an assessment. It outlines the intent and processes surrounding this RPL assessment and how it differs from assessment undertaken following formal training.

SECTION B – Candidate Information and Application Forms

You give this information to the candidate. It tells them about the assessment process as well as containing simple forms for the applicant to fill out. From the information provided by the candidate on these forms, you will be able to gain a general understanding of the skills and experience the candidate may have, as well as potential referee contacts.

SECTION C – Competency Conversation

You use this section to determine and record candidate competence via a competency conversation. In other words, these questions guide your conversation with the applicant and assist in your assessment of their competence. The notes you take about this conversation are important evidence for assessment.

SECTION D – Practical Tasks and Observation Recording Sheets

You use this section to assess competencies through a practical demonstration of the candidate's skills. It contains practical tasks/scenarios on the outcomes required to determine competency and a place to record your observation. The notes you take are important evidence for assessment.

SECTION E – Resources for Practical Tasks

You use this section to access required resources for performing practical tasks and scenarios.

SECTION F – Third Party Verification

You give this section to the referees to confirm the candidate's skills and experience in this qualification/occupation. The referees may fill out the appropriate form and return to you to confirm your judgement. You may be able to complete this part of evidence gathering in person while at the workplace.

SECTION G – Assessment Tables

You use this table as a reference tool to see at a glance how units/elements of competency are assessed within the tool. All the elements and performance criteria within the competency units are cross-matched in this table with a corresponding assessment question/task/scenario. This allows you to validate the assessment process against the qualification.

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SECTION A

Assessor Information

It is VITAL you read this information prior to commencing your RPL assessment. It provides generic information on assessment, as well as an overview of this streamlined RPL assessment process.

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ADVICE FOR ASSESSORS

This RPL Assessors Kit streamlines the RPL assessment process for Certificate III in Business and Certificate III in Business Administration taking a practical approach to RPL and increasing the use of on-site questioning and observation. This will assist in developing a "picture of the candidate's skills and knowledge". This picture can then be compared with industry standards enabling a determination of whether the candidate has achieved the required outcomes.

IMPORTANT ASPECTS TO REMEMBER:

A sound knowledge of assessment and the qualification is essential

It is important to have a good understanding of the competencies and qualification/s appropriate to the candidate's goals.

Assessing a single unit of competency is rarely cost or time effective. Where possible, effort should be made to assess several units at the same time taking advantage of any commonality in content. This means looking at the whole picture of a particular job role as it happens in industry and assessing holistically. This saves valuable time in the assessment process.

Assessment involves judgement

This tool encourages the use of a "*competency conversation*" to maximise the candidate's opportunities to demonstrate competence. This is NOT an oral exam. It is about using the two or three holistic questions provided to start a conversation with the candidate which draws out their actual individual experiences and relevant skills. In other words, it is about the assessor probing the candidate through a conversation to draw out further information on the candidate's experience which may not be forthcoming due to nerves or confusion over technical terminology.

The tool also provides observable tasks to allow candidates to demonstrate skills.

Authentication/verification is integral to RPL assessment

It is critical information gleaned from the interview and observation be confirmed with those who can vouch for the candidate's skill over time. Supervisors would generally perform this role. Authentication may also be done through conversation but it cannot be stressed enough that it is essential assessors **take careful notes** to back up and record their judgement.

Recording assessment is critical

Keep careful records of all aspects of conversations, skills demonstration or documentation viewed that support the claim of prior learning. Remember – the record is the document that makes sense of the assessment and why a particular judgment was made. Keeping **detailed notes** about the candidate's response is vital, as is the **rationale** for judgement.

The assessment record is a **legal document** and must be signed, dated and stored according to requirements of the State Training Authority and the *AQTF Standards for Registered Training Organisations.*

Assessor summaries and other quality assurance documentation from your own Registered Training Organisation will also be required. For examples of assessment summary documentation, please see *Assessment Guide Number 1: Training Package Assessment Materials Kit*: http://resourcegenerator.gov.au/loadpage.asp?page=TPAGGuide01.htm

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To access further information on the principles assessment and dimensions of competency, you can visit *Assessment Guide Number 1: Training Package Assessment Materials Kit*.
http://resourcegenerator.gov.au/loadpage.asp?page=TPAGGuide01.htm

To access further information on the Australian Qualifications Framework, you can visit:
http://www.aqf.edu.au/

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COMPETENCIES IN THIS ASSESSMENT TOOL

CERTIFICATE III IN BUSINESS and CERTIFICATE III IN BUSINESS ADMINISTRATION

COMMON BUSINESS UNITS

Unit Code	Unit Title	Questions	Practical
BSBCMN301A	Exercise initiative in a business environment	✓	✓
BSBCMN302A	Organise personal work priorities and development	✓	✓
BSBCMN304A	Contribute to personal skill development and learning	✓	✓
BSBCMN305A	Organise workplace information	✓	✓
BSBCMN306A	Produce business documents	✓	✓
BSBCMN307A	Maintain business resources	✓	✓
BSBCMN308A	Maintain financial records	✓	✓
BSBCMN309A	Recommend products and services	✓	✓
BSBCMN310A	Deliver and monitor a service to customers	✓	✓
BSBCMN311A	Maintain workplace safety	✓	✓
BSBCMN312A	Support innovation and change	✓	✓
BSBCMN313B	Maintain environmental procedures	✓	
BSBCMN314A	Utilise a knowledge management system	✓	✓
BSBCMN315A	Work effectively with diversity	✓	✓
BSBCMN316A	Process customer complaints	✓	✓
BSBCMN317A	Meet customer needs and expectations	✓	✓
BSBCMN318A	Write simple documents	✓	✓
BSBCMN319A	Apply advanced first aid Pre-requisites: BSBCMN218A	✓	✓
BSBCMN320A	Maintain first aid equipment and resources	✓	✓
BSBFLM303B	Contribute to effective workplace relationships	✓	✓

SPECIALIST ADMINISTRATION UNITS

Unit Code	Unit Title	Questions	Practical
BSBADM301A	Produce text from shorthand notes	✓	✓
BSBADM302A	Produce texts from notes	✓	✓
BSBADM303A	Produce texts from audio transcription	✓	✓
BSBADM304A	Design and develop text documents	✓	✓
BSBADM305A	Create and use databases	✓	✓
BSBADM306A	Create electronic presentations	✓	✓
BSBADM307A	Organise schedules	✓	✓
BSBADM308A	Process payroll	✓	✓
BSBADM309A	Process accounts payable and receivable	✓	✓
BSBADM310A	Maintain a general ledger	✓	✓

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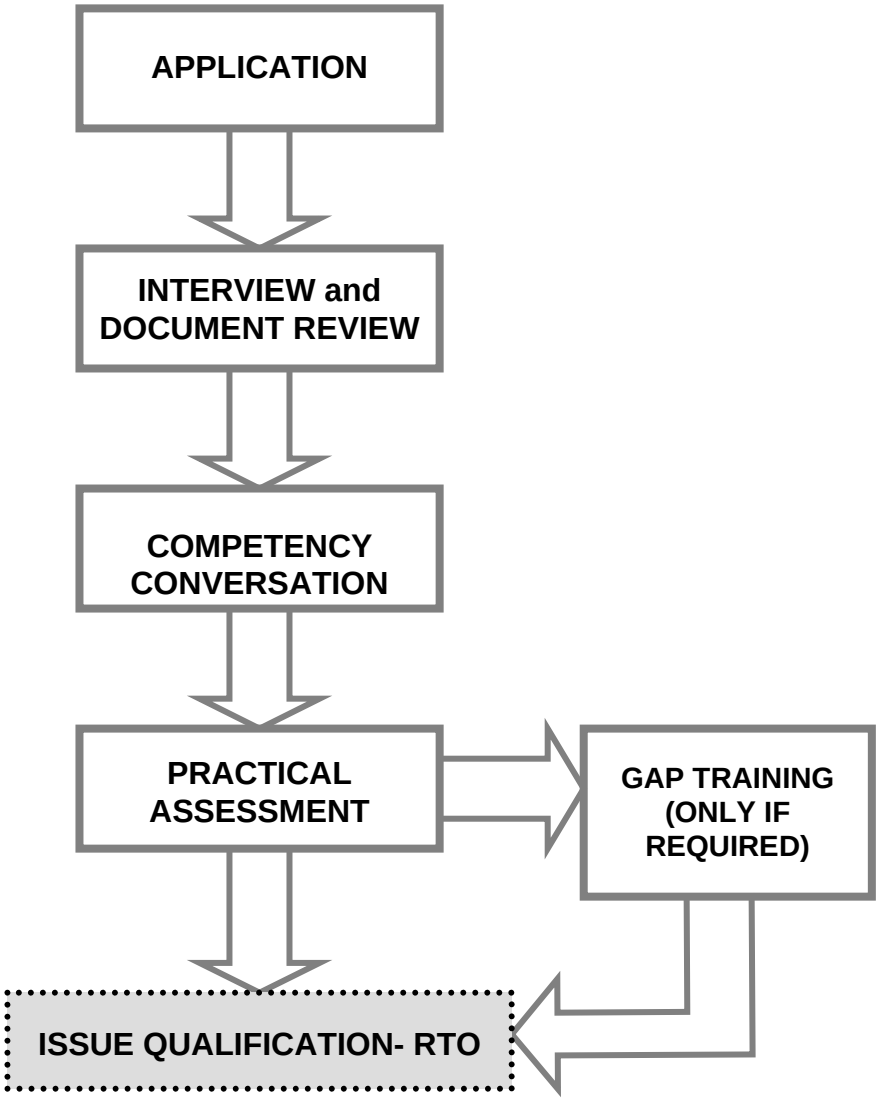
OVERVIEW OF RECOGNITION PROCESS

This kit has been developed to streamline the application for recognition of prior learning.



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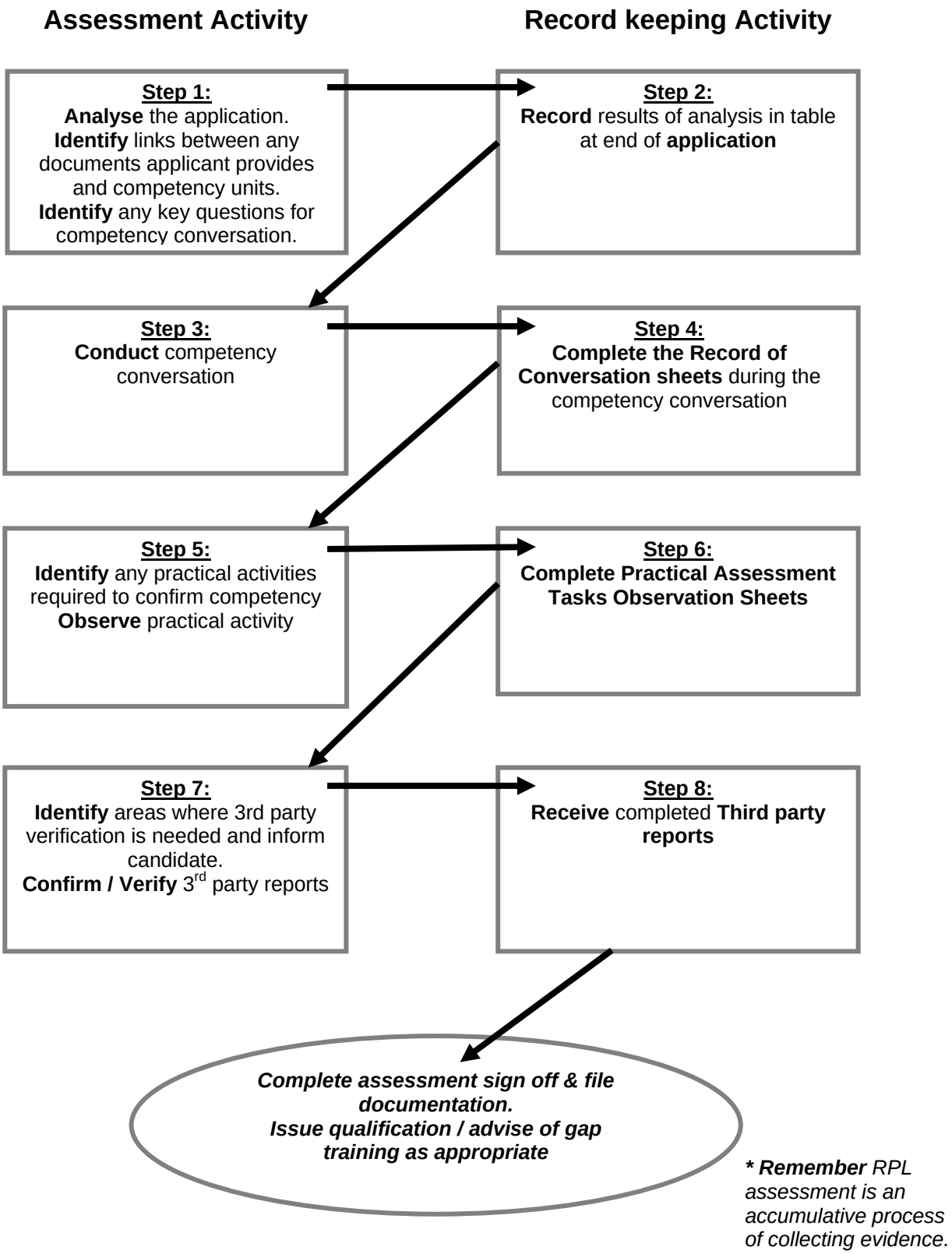
RPL ASSESSMENT PROCESS FLOWCHART FOR ASSESSORS



**** Remember** RPL assessment is an accumulative process of collecting evidence.*

STEPS IN THE RPL PROCESS

1. Complete application

The candidate completes the application forms in **SECTION B**. It is important candidates provide as much information of their previous experience in the business service as is available.

Documents that may be available include but are not limited to:

General employment documents

- brief CV or work history
- position descriptions
- certificates/results of assessment
- details of in house courses, workshops, seminars, orientation or induction sessions
- references/letters from previous employers/supervisors

Workplace documents (NB: please block out any confidential client information)

- task sheets / job sheets
- documents you have produced that show you can use software eg. letters, memos, spreadsheets
- copies of equipment maintenance registers you have completed (eg. organising printer repairs and service, equipment log books)
- cash balancing and reconciliation forms you have completed
- documents showing how you reconciled debtors, accounts receivable
- aged debtor reports you have generated and actioned
- batch control sheets for data you have input into an accounting package
- customer complaints you have responded to and resolved
- journal forms you have written up, including any calculation sheets and supporting documentation
- reconciliation sheets for end-of-day cash balancing processes you have completed
- file notes or memos showing advice and assistance you have provided to clients
- any other documentation that may demonstrate industry experience

Candidates also need to provide contact details for one or two referees who can confirm their industry skills in context and over time.

To have skills formally recognised under the Australian Qualifications Framework, you must ensure the candidate's skills meet industry standards.

2. Interview about candidate's documentary information

Review the information provided by the candidate and arrange a time for both you and the candidate to discuss. Begin alignment of documentation and skills to the following qualification:

BSB30101 Certificate III in Business
BSB30201 Certificate III in Business Administration

The candidate will have the opportunity to discuss and identify previous experience with you. The available documents are step one in collecting information and you will need to determine which units of competency, if any, are fully covered at this stage. You use your own or your RTO's assessment recording forms to record this stage of the assessment.

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There may be instances where the candidate has little, or no, documentary information of industry experience. This is **not** a barrier to gaining recognition. This will just require you to rely on the questioning, practical assessment and referee validation phases of the RPL process.

3. Questions for the Competency Conversation

The bank of questions in **SECTION C** is the next phase in collecting evidence for the RPL process. The questions are designed to enable you to have a "competency conversation" with the candidate to further gain evidence of their past experience. **REMEMBER**, the primary focus is on the candidate's experience.

Each question has "key points" to look for in responses. You may use the list of key points to formulate questions of your own if you wish, or contextualise the question to the candidate's particular work situation. The Record of Conversation sheets indicate relevant content that should be sought. Place a tick next to each key point as you hear this topic being discussed during the conversation. You should read the "industry requirements" of each competency before the candidate answers the questions posed. You may also target the assessment to those aspects that present the *greatest risk* in the industry. Questions are aligned with the relevant unit/s of competency in **SECTION G**.

It is not intended every question for all competencies is asked, only those competencies the initial interview about the candidate's documentary evidence has failed to **fully** address. The question bank covers most but not all units in the kit. Units without questions are covered in the practical assessment/scenario section.

4. Practical assessment tasks

It is important that you use both Steps 3 (Questioning) and 4 (Practical Assessment) in doing this assessment. The RPL process is a streamlined RPL process which **does not** rely solely on practical assessment but uses a combination of questioning and practical to provide evidence of candidate competence.

This is the third phase in collecting evidence. A practical skills test is then conducted by you at the candidate's workplace or another suitable venue. Appropriate permission must be sought before entering workplaces.

This is a further opportunity for candidate to demonstrate competence. It is expected the practical assessment will comprise **only those competencies** the candidate is still unable to demonstrate knowledge/experience in after documentary review and questioning have been applied. These assessments contain the practical skills and application of knowledge for the qualification. A number of holistic practical assessments are included in this kit (**SECTION D**) to assist you with tasks suitable for observation on the job.

You decide if the response to questions and practical assessment tasks fulfils the requirements of the standard and may choose to pursue the issue further for a determination to be made. The assessment is a conversation/observation, not an exam, and you are encouraged to assist candidates to focus responses toward relevant issues.

Assessing through observation and questioning, particularly on the job, will speed up and streamline the RPL assessment process.

NOTE: Where candidate's documentation and questions meet the assessment requirement, it is still strongly recommended the candidate undertake one practical assessment so you are confident

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in making a judgement of "competent". The practical assessment selection should be negotiated between you and the candidate.

Recording sheets for candidate information, questioning and the practical assessments have been included in **SECTION D**. You may use other recording mechanisms provided these also keep a complete record of assessment *and justification of judgement*. Candidate responses, observations of skills demonstrated and documents presented as evidence must be noted in enough detail so anyone external to the process (e.g. a fellow assessor, auditor, lawyer, etc) can read the record and retrace your judgement.

5. Gap training

RPL is an assessment process designed to show areas of competence and to identify IF a candidate has gaps in skills and knowledge against a whole qualification.

Not all candidates will have skill/knowledge gaps.

If a candidate has skills gaps, a pathway to complete training in the outstanding units can be negotiated to assist the client to gain the full qualification.

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EVIDENCE REVIEW

Recognition of prior learning outcomes (both Granted and Not Granted) are now funded nationally and as such will be included in National AVETMISS audits. NCVER have stipulated evidence recording requirements for RPL assessments as a minimum requirement for passing an AVETMISS audit. The following "Evidence Review" proforma has been approved by NCVER as covering AVETMISS audit requirements for RPL recorded outcomes. It also gives you an opportunity to track a student's assessment progress at a glance.

It is expected that this "Evidence Review" summary sheet (or similar) would be attached to each participant's evidence compiled during the RPL assessment process.

(Place a tick in the appropriate evidence collection method column for each unit of competency. Place a line through those units not examined as part of this RPL assessment.)

Unit Code	Unit Title	Questions	Practical	Documents	3rd Party Report	Other evidence
COMMON BUSINESS UNITS						
BSBCMN301A	Exercise initiative in a business environment					
BSBCMN302A	Organise personal work priorities and development					
BSBCMN304A	Contribute to personal skill development and learning					
BSBCMN305A	Organise workplace information					
BSBCMN306A	Produce business documents					
BSBCMN307A	Maintain business resources					
BSBCMN308A	Maintain financial records					
BSBCMN309A	Recommend products and services					
BSBCMN310A	Deliver and monitor a service to customers					
BSBCMN311A	Maintain workplace safety					
BSBCMN312A	Support innovation and change					
BSBCMN313B	Maintain environmental procedures					
BSBCMN314A	Utilise a knowledge management system					
BSBCMN315A	Work effectively with diversity					
BSBCMN316A	Process customer complaints					
BSBCMN317A	Meet customer needs and expectations					
BSBCMN318A	Write simple documents					
BSBCMN319A	Apply advanced first aid Pre-requisites: BSBCMN218A					
BSBCMN320A	Maintain first aid equipment and resources					
BSBFLM303B	Contribute to effective workplace relationships					
SPECIALIST ADMINISTRATION UNITS						
BSBADM301A	Produce text from shorthand notes					

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Unit Code	Unit Title	Questions	Practical	Documents	3rd Party Report	Other evidence
BSBADM302A	Produce texts from notes					
BSBADM303A	Produce texts from audio transcription					
BSBADM304A	Design and develop text documents					
BSBADM305A	Create and use databases					
BSBADM306A	Create electronic presentations					
BSBADM307A	Organise schedules					
BSBADM308A	Process payroll					
BSBADM309A	Process accounts payable and receivable					
BSBADM310A	Maintain a general ledger					

Assessor's Name: _____

Assessor's Signature: _____

Date: _____

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SECTION B

Candidate Information and Application Forms

You give this information to the candidate for them to read about the RPL process and to complete the appropriate forms.

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WHAT DOES IT MEAN TO BE WORKING IN BUSINESS SERVICES

Certificate III in Business or Certificate III in Business Administration is a qualification that is recognised by the Business Services industry to cover various roles within this field.

Working in the Business Services industry is extremely rewarding with many opportunities in various positions within an organisation. These may include a receptionist, personal assistant, managers assistant, accounts clerk, office assistant or general office administrator. These roles have many responsibilities and are considered important within the organisational network. They form part of a team to ensure the successful running of a business.

In order to gain the Certificate III in Business, you must complete 12 units of competency. A minimum of 8 units from the common business units and any other 4 units listed in this tool.

In order to gain the Certificate III in Business Administration, you must complete 12 units of competency. A minimum of 5 units from the specialist administration list, a minimum of 3 units from the common business units including BSBCMN311A and any other 4 units listed in this tool.

To gain the compulsory units for the certificate you need to be able to demonstrate that you can currently do or possess the following:

- a sound working knowledge of relevant legislation and codes of practices for the business services industry to ensure compliance;
- sound knowledge of organisational and industry policies and procedures;
- ability to read and input data accurately using relevant technology;
- respond to customer enquiries and customer complaints;
- sales and service
- maintaining financial records
- performing general administrative duties

"If you are doing these roles in your job, then don't write off your skills – consider getting them recognised".

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TIPS AND HINTS TO HELP YOU PREPARE FOR RECOGNITION

To have skills formally recognised in the national system, assessors must make sure you have the skills and knowledge to meet the industry standard. This means you must be involved in a careful and comprehensive process that covers the content of all unit/s or qualification/s you can be recognised for.

Assessment happens in a variety of ways. Being prepared can save you valuable time and hassle and make the recognition process stress-free for you.

Here are some tips and hints for you:

1. Be prepared to talk about your job roles and your work history. Bring a resume or jot down a few points about where you have worked, either paid or unpaid, and what you did there.

2. Bring your position description and any performance appraisals you have from any businesses or facilities you have worked in.

3. Consider the possibilities for workplace contact. Are you in a workplace that is supporting your goal to get qualified? Would you feel comfortable to have the assessor contact your workplace or previous workplaces so your skills can be validated?

4. Think about who can confirm your skill level. Think about current or recent supervisors who have seen you work in the past 18 months and will be able to confirm your skills. The assessor will need to contact them. You may also have community contacts or even clients themselves who can vouch for your skill level.

5. Collect any certificates from in-house training or formal training you have done in the past.

6. You can speak with your training organisation about other ways you can show your skills in the business service. These could be letters from employers, records of your professional development sessions, employers or clients in related industries or government agencies, acknowledgements, workplace forms (as long as they don't show client details) or other relevant documents.

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STEPS IN THE RPL PROCESS

Step 1 – Provide information of your skills and experience

Complete the attached forms and provide as much information of your previous experience in the business services as you can. This is your first opportunity (and not the last) to provide proof of your variety of experience in the industry. Here you can supply examples of your work history which could include:

General employment documents

- brief CV or work history
- position descriptions
- certificates/results of assessment
- details of in house courses, workshops, seminars, orientation or induction sessions
- references/letters from previous employers/supervisors

Workplace documents (NB: please block out any confidential client information)

- task sheets / job sheets
- documents you have produced that show you can use software eg. letters, memos, spreadsheets
- copies of equipment maintenance registers you have completed (eg. organising printer repairs and service, equipment log books)
- cash balancing and reconciliation forms you have completed
- documents showing how you reconciled debtors, accounts receivable
- aged debtor reports you have generated and actioned
- batch control sheets for data you have input into an accounting package
- customer complaints you have responded to and resolved
- journals forms you have written up, including any calculation sheets and supporting documentation
- reconciliation sheets for end-of-day cash balancing processes you have completed
- file notes or memos showing advice and assistance you have provided to clients
- any other documentation that may demonstrate industry experience

Depending on the industry you have worked in, you may or may not have documentary evidence available. This should not deter you from seeking RPL as the Assessor will work with you during the RPL process.

You will also need to supply contact details of one or two work referees who can confirm your skills in the industry.

Step 2 – Conversation with Assessor

An assessor will review the information you have provided (usually with you) and begin to match up your skills to the units/subjects in the qualification. At this point, you will have the opportunity to discuss and identify your previous experience with the assessor who will understand your industry experience and conduct a competency conversation with you. You will be required to answer business service related questions to identify your current skills.

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Step 3 – Practical demonstration of your skills

The assessor will conduct a practical skills test at your workplace (if appropriate) or at another suitable venue. This, again, is an opportunity to demonstrate your level of competence. This assessment will be focussed on skills that are required in the qualification. Your assessor will identify the skills that he/she will want you to demonstrate.

Further steps

After the assessment, your assessor will give you information about the skills that have been recognised and whether you have gained the full qualification. If you do have skill gaps, these may be addressed through flexible training.

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APPLICATION – Self Assessment Questionnaire
BSB30101 Certificate III in Business
BSB30201 Certificate III in Business Administration

Candidate Name: _____ **Date Completed:** _____

Please identify your level of experience in each competency.

Unit Code	Unit Title	I have performed these tasks		
		Frequently	Sometimes	Never
COMMON UNITS				
BSBCMN301A	Exercise initiative in a business environment			
BSBCMN302A	Organise personal work priorities and development			
BSBCMN304A	Contribute to personal skill development and learning			
BSBCMN305A	Organise workplace information			
BSBCMN306A	Produce business documents			
BSBCMN307A	Maintain business resources			
BSBCMN308A	Maintain financial records			
BSBCMN309A	Recommend products and services			
BSBCMN310A	Deliver and monitor a service to customers			
BSBCMN311A	Maintain workplace safety			
BSBCMN312A	Support innovation and change			
BSBCMN313B	Maintain environmental procedures			
BSBCMN314A	Utilise a knowledge management system			
BSBCMN315A	Work effectively with diversity			
BSBCMN316A	Process customer complaints			
BSBCMN317A	Meet customer needs and expectations			
BSBCMN318A	Write simple documents			
BSBCMN319A	Apply advanced first aid			
BSBCMN320A	Maintain first aid equipment and resources			
BSBFLM303B	Contribute to effective workplace relationships			
SPECIALIST ADMINISTRATION UNITS				
BSBADM301A	Produce text from shorthand notes			
BSBADM302A	Produce texts from notes			
BSBADM303A	Produce texts from audio transcription			
BSBADM304A	Design and develop text documents			
BSBADM305A	Create and use databases			
BSBADM306A	Create electronic presentations			
BSBADM307A	Organise schedules			
BSBADM308A	Process payroll			

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Unit Code	Unit Title	I have performed these tasks		
		Frequently	Sometimes	Never
BSBADM309A	Process accounts payable and receivable			
BSBADM310A	Maintain a general ledger			

Candidate Signature: _____ **Date:** _____

RPL APPLICATION FORM

Applicant Details:

1. Occupation you are seeking recognition in		
2 Personal Details		
Surname		
Preferred Title (Mr, Mrs, Ms, Miss)		
First Name/s		
Any other name used		
Home Address		
Postal address if different from above		
Telephone Numbers	Home:	Work:
	Mobile:	Fax:
Date of Birth	/ /	
Gender	MALE ☐ / FEMALE ☐	
Age		
Are you a permanent Resident of Australia	YES ☐ / NO ☐	
3 Current Employment		
Are you currently employed? If Yes, in which occupation are you currently employed? Who is your current employer?	YES ☐ / NO ☐ …… ……	
4. Armed Forces details (If Applicable)		
Branch of Service		
Trade classification on discharge		

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5. Further Training	
Have you undertaken any training courses related to the occupation applied for?	YES ☐ / NO ☐
If Yes	
What occupation were you trained in?	
Training completion Date (month, year)	
Country where you trained	
Name of course and institution (if applicable)	
6. Is there any further information you wish to give in support of your application	
7. Professional Referees (relevant to work situation)	
Name Position Organisation Phone Number Mobile Number Email Address	…… …… …… …… …… ……
Name Position Organisation Phone Number Mobile Number Email Address	…… …… …… …… …… ……

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APPLICANT EMPLOYMENT HISTORY FORM

Name, Address and Phone number of Employers	Period of Employment (DD/MM/YYYY)		Position Held	Full Time Part-time Casual	Description of Major Duties
	From	To			
1.					
2.					
3.					
4.					

Attach additional sheet if required

If you are including documents in your application, please provide a brief description below

Document Description (e.g. resume, photos, awards etc)	**Office Use Only** – Assessor to use this section to align documents to specific units of competency and identify key questions for competency conversation

Declaration

I declare that the information contained in this application is true and correct and that all documents are genuine.

Candidate Signature: _____ **Date** _____

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SECTION C

Competency Conversation

This section assists the assessor in documenting the competency conversation.

Do NOT give this section to the candidate.

Once you have assessed the candidate's documentary information and determined which competencies you still require more information/evidence on, you use the question bank and Record of Conversation sheets in this section to document evidence of past experience. It is not intended that every question for all competencies be discussed during the conversation, only those competencies the initial documentary review has failed to fully address.

Each question has "key points" to look for in responses. You may use the list of key points to formulate questions of your own if you wish, or contextualise or rephrase the suggested question to the candidate's particular work situation. The questions are not intended to be a formal 'script' for the assessor to follow, but to provide guidance in exploring the range of the candidate's skills, knowledge and experience in performing a particular task or function.

The Record of Conversation sheets indicate relevant content that should be sought. Place a tick next to each key point as you hear this topic being discussed during the conversation. In doing so, you are making a statement of fact about what you hear the candidate say during the competency conversation. Use the Comments section to provide further detail about the context of the discussion or briefly outline any examples discussed by the candidate. You may also use the Comments section to make a brief analysis of the responses or summary judgements about the quality of the candidate's responses in relation to the requirements of the competency standard.

Remember, the notes you take about this conversation are important evidence and should be retained in the candidate's assessment record.

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QUESTION BANK

Note to Assessors: Refer to "Record of Conversation" sheets

Unit of Competency	Question
COMMON BUSINESS UNITS	
BSBCMN301A Exercise initiative in a business environment	**1:** Describe a time when you received feedback to improve your work practices. How did you react to the feedback and what action did you take? **2:** Explain a task you were required to complete as part of a team. How did you support your team members and what part did you play in ensuring the work outcomes were of a high standard? **3:** In making a decision in your workplace, how have you ensured you made an informed decision?
BSBCMN302A Organise personal work priorities and development	**4:** Tell me about a time you had to handle an unforseen problem at work. How did you control the impact this had on the achievement of your work goals. **5:** What have you done to ensure your personal work performance meets your organisation's standards for quality and customer service? **6:** What measures have you taken in the past 12 months to ensure your personal development and competency is up to date?
BSBCMN304A Contribute to personal skill development and learning	**7:** Describe a personal learning need you identified and how you recognised this need. What did you do to gain the learning required? **8:** Discuss your plans to further develop your skills and keep your industry knowledge up to date? **9:** Explain your organisation's performance review policy in relation to training and monitoring learning outcomes.
BSBCMN305A Organise workplace information	**10:** Provide two (2) examples of information you have distributed to others. What format was it distributed in? How was the information collected and how did you ensure it was up-to-date? **11:** Describe how paper and electronic information is stored in your organisation. What are the protocols for accessing client data? What are the information management protocols that relate to the secure storage of client information? **12:** How do you gain feedback from others about the sufficiency of the information available and its relevance for decision making. What changes have been made as a result of feedback?
BSBCMN306A Produce business documents	**13:** Describe three (3) documents you have produced recently at work and the design format of each document. What technology and software did you use? What information did you access to complete the document? **14:** How have you ensured completed documents meet quality standards and task requirements? **15:** Explain a time you had difficulty producing a document due to lack of knowledge of a software package and how you overcame this.

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Unit of Competency	Question
BSBCMN307A Maintain business resources	**16:** Describe a time you were asked to estimate future equipment and resource requirements and how you went about producing the estimate. **17:** Explain your organisation's procedures for acquiring equipment and resources. **18:** What impact would a shortage of resources have in your workplace? How are resources monitored to ensure a shortage does not occur? **19:** Discuss the safe work practices you have implemented when using equipment.
BSBCMN308A Maintain financial records	**20:** Tell me about the steps you have taken to prepare and process four (4) different financial documents in your workplace. **21:** How do you ensure accuracy of records? **22:** List the journals you have prepared and the corresponding source for each. **23:** Describe the process you have used to record account payments received and payable accounts.
BSBCMN309A Recommend products and services	**24:** Describe the products and services offered by your organisation and discuss how you keep your knowledge current on these products and services. **25:** Tell me about a time you recommended products and services to a customer. Where did you source information on the product/service and what factors did you consider in your recommendation? **26:** In advising on promotional activities of products/services, what types of advice have you provided and what data did you base your advice on? **27:** What types of feedback has your company collected on promotional activities of products and services and how was the feedback used to plan future activities?
BSBCMN310A Deliver and monitor a service to customers	**28:** Describe a time you have helped a customer and satisfied their needs. How did you clarify their needs? How did you ensure these needs were met in a timely manner? **29:** Explain the types of activities your organisation has undertaken to identify needs and expectations of customers. **30:** Discuss a customer complaint you have dealt with. What did you do to ensure the customer was satisfied and that a similar complaint did not reoccur?
BSBCMN311A Maintain workplace safety	**31:** Describe a hazard you have identified in your workplace and what you did to control or remove the hazard. How did you record this? **32:** Explain how you apply safe work practices in your immediate work area. **33:** How is workplace health and safety monitored in your workplace and how have training needs been identified? **34:** Describe your workplace emergency evacuation procedures. (Assessor prompts: What are the different building alarms? Where is the nearest exit? What is the evacuation route? Where is the congregation point? Who are the key personnel eg. floor wardens, safety officers? When was the last fire drill / evacuation drill?)
BSBCMN312A Support innovation and change	**35:** Discuss a change to work practices implemented in your workplace. How was the need for change identified and how was the change implemented? **36:** Describe an innovative idea you have had to improve work practices. What guidelines did you follow when considering the idea and how did you source feedback on the idea? **37:** How has business technology been used in your workplace to support implementation of change?

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Unit of Competency	Question
BSBCMN313B Maintain environmental procedures	**38:** Describe your organisation's environmental policies and procedures. How have you ensured your work practices meet the requirements of these policies? **39:** Discuss your role and responsibilities in identifying environmental hazards and assessing risk in your area. What types of reports are you required to complete (both internal and external)? **40:** Provide three (3) examples of environmental risks you have identified in your work area. **41:** What training have you undertaken on environmental procedures and what did the training cover?
BSBCMN314A Utilise a knowledge management system	**42:** Describe your organisation's knowledge management system and the information you were provided on how to use the system. **43:** When inputting data, what measure do you take to ensure errors do not occur? What do you do if an error does occur? **44:** Provide two (2) examples where work practices in your organisation were improved as a result of feedback from the use of the knowledge management system.
BSBCMN315A Work effectively with diversity	**45:** Describe individual differences you have encountered in your workplace amongst colleagues and customers. How have you shown you value diversity? **46:** How have you encouraged individuals in your team to use their special qualities, skills or backgrounds to enhance work outcomes?
BSBCMN316A Process customer complaints	**47:** In line with your level of responsibility, discuss a customer complaint you have handled and how you processed the complaint. **48:** How do you handle a complaint not within your scope of responsibility?
BSBCMN317A Meet customer needs and expectations	**49:** In line with your scope of responsibility, discuss a customer enquiry you have handled and how you were able to meet their expectations. **50:** What details did you require from the customer in order to process their enquiry and how did you record them? **51:** When taking a customer order, how have you determined availability of products/services required?
BSBCMN318A Write simple documents	**52:** Discuss three (3) examples of simple documents you have written. What factors did you consider when planning the document? What resources did you access to identify organisation requirements for the document? How did you decide what to include as content? **53:** What details have you or your supervisor checked when proofreading a draft document? How did you ensure the changes were made before sending?
BSBCMN319A Apply advanced first aid	**54:** When responding to a first aid incident, what types of hazards and risks to self and others do you need to be aware of? **55:** List the skills and attributes required of an advanced first aid officer. **56:** Outline your organisation's policies and procedures on first aid delivery – including maintenance of resources and equipment, first aid management of delivery and administration of medication. **57:** Discuss an emergency situation you have attended to - initial steps taken, how you assessed and managed the situation, how you determined if medical assistance was required and procedures followed after the incident.

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Unit of Competency	Question
BSBCMN320A Maintain first aid equipment and resources	**58:** Discuss your organisation's procedures around availability, storage and security and maintenance of first aid resources and equipment. **59:** Explain the methods used to recover and clean reusable first aid and/or medical equipment and disposal of contaminated medical waste. **60:** Outline required records, forms and books you have completed and discuss the internal and external reporting procedures you have followed.
BSBFLM303B Contribute to effective workplace relationships	**61:** Describe a time when you have used your communication skills to relay information; for example, making a presentation, selling the benefits of a financial services product, negotiating with supplier or advocating on behalf of clients. What techniques did you use to ensure a positive outcome? **62:** Explain the action you have taken when a problem was identified in your team. How did you contribute to a positive outcome? **63:** How have you minimised issues and difficulties that may have occurred because of workplace misunderstandings due to cultural or personal differences?
SPECIALIST ADMINISTRATION UNITS	
BSBADM301A Produce text from shorthand notes	**A1.** Describe a document you have produced from shorthand notes, notes or audio transcription. How did you prepare to take notes? What checks did you make on the notes? What did you do to ensure accuracy?
BSBADM302A Produce text from notes	**A2.** How have you handled a situation where the author dictates names and terms with which you are not familiar or you have difficulty understanding the author?
BSBADM303A Produce texts from audio transcription	**A3.** Think of a time when you wrote a proposal, a report, or provided written advice to a client. What are some of the factors you considered when planning the document? What reference material do you access to ensure the information you communicated was accurate and complete?
BSBADM304A Design and develop text documents	**A4.** What are some of the ergonomic practices you routinely apply when using computers? **A5.** In designing a text document, what factors have you considered, what advanced functions have you used and how have you ensured its readability? **A6.** How have you ensured documents met quality standards, timelines and electronic storage procedures?
BSBADM305A Create and use databases	**A7.** Discuss three (3) databases you have created. How did you decide what information should be included in the database? **A8.** Discuss how you have used a database to input data, run queries and generate reports.
BSBADM306A Create electronic presentations	**A9.** In creating an electronic presentation, describe the factors you have considered regarding content, design and organisational requirements. **A10.** Aside from creating an electronic presentation, explain other factors you have considered as part of the presentation e.g. rehearsals, additional material requirements, room preparation.

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Unit of Competency	Question
BSBADM307A Organise schedules	**A11.** Describe the appointment and meeting scheduling system/s in your workplace including procedures, authority and access to diaries for other employees. **A12.** Provide an example of a time you managed a meeting schedule for a group of people with conflicting appointments and priorities.
BSBADM308A Process payroll	**A13.** Outline the breadth of your responsibilities in respect of processing payroll; that is, what are the various payroll functions you have performed? **A14.** What end of year payroll processes have you managed? **A15.** Detail a time when there was a problem with a staff member's pay – for example, wrong pay scale was applied, funds not deposited to the employee's bank account, etc. What interventions did you make to correct the problem?
BSBADM309A Process accounts payable and receivable	**A16.** After entering creditor details, what steps have you taken to process an account for payment? Describe the process you follow for processing and entering accounts payable, from the receipt of the invoice to the payment. **A17.** Discuss a situation where you have reversed an accounts payable entry, or processed an adjustment note or credit memo. What is the difference between reversing an entry, and processing an adjustment? **A18.** How do you manage outstanding accounts payable to ensure the good business standing of your organisation with creditors? **A19.** How have you identified bad or doubtful debt when reviewing accounts receivable? What are your organisation's recommended collection actions for each ageing bracket? **A20.** What actions have you taken to recover debt?
BSBADM310A Maintain a general ledger	**A21.** In processing a journal entry, what have you checked, verified and prepared before entering the data? **A22.** After entering and allocating the data, how did you check your accuracy? **A23.** What are some of the typical processing errors you have encountered when processing journals? **A24.** Explain a trial balance and the steps you have taken to prepare a trial balance.

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COMMON BUSINESS UNITS

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RECORD OF CONVERSATION

BSBCMN301A Exercise initiative in a business environment

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 1: Describe a time when you received feedback to improve your work practices. How did you react to the feedback and what action did you take?

Question 2: Explain a task you were required to complete as part of a team. How did you support your team members and what part did you play in ensuring the work outcomes were of a high standard?

Question 3: In making a decision in your workplace, how have you ensured you made an informed decision?

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 1	Company policies and procedures Legislation Company strategic objectives Quality work standards Continuous improvement		
Gives and receives feedback			
Remains positive			
Seeks opportunity to improve			
Reviews work standards			
Improves work practices			
Monitors improvement			
Seeks and gives constructive feedback on improvement			
Question 2			
Explains task			
Identifies responsibilities in the team			
Maintains a positive attitude towards work			
Support organisation's goals and values			
Co-operates with others			
Supports and encourages others			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Acts fairly and ethically at all times			
Respects individual differences			
Uses initiative to improve work practices			
Helps others complete work			
Question 3			
Clarifies parameters for decision making			
Ensures decisions are based on valid and reliable information			
Ensures decisions are ethical, legal and based on organisation requirements			
Clarifies the impact of the decision			

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RECORD OF CONVERSATION

BSBCMN302A Organise personal work priorities and development

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 4: Tell me about a time you had to handle an unforseen problem at work. How did you control the impact this had on the achievement of you work goals.

Question 5: What have you done to ensure your personal work performance meets your organisation's standards for quality and customer service?

Question 6: What measures have you taken in the past 12 months to ensure your personal development and competency is up to date?

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 4			
Explains problem interruption customer problem delays by others technology or equipment breakdown	Legislation Company policies and procedures Productivity Time constraints Business technology		
Plans for contingencies			
Allows for time delays			
Plans to achieve other work outcomes during delays			
Asks for help			
Prioritises and plans to complete non-priority work later			
Question 5			
Sequences work efficiently			
Follows procedures, work instructions			
Complies with legislative and regulatory requirements			
Monitors own work output and seeks feedback			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Uses controlled documents – forms, task checklists, batch control sheets, etc			
Complete workplace documentation at each stage of process			
Reports errors and inconsistencies			
Takes corrective action / resolves issues			
Contributes to procedural improvements			
Question 6			
Professional workshops			
Community courses			
In-house programs			
Coaching and mentoring			
Conferences			
e-learning			
Formal education			

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RECORD OF CONVERSATION

BSBCMN304A Contribute to personal skill development and learning

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 7: Describe a personal learning need you identified and how you recognised this need. What did you do to gain the learning required?

Question 8: Discuss your plans to further develop your skills and keep your industry knowledge up to date?

Question 9: Explain your organisation's performance review policy in relation to training and monitoring learning outcomes.

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 7			
Describes learning need	Legislation		
Identifies learning need through self assessment training needs analysis performance feedback personal feedback difficulty in completing tasks limited opportunities for promotion	Company policies and procedures Industry standards Organisation philosophy, values and objectives Industrial awards/agreements		
Seeks learning through internal training external training job rotation coaching/mentoring			
Question 8			
Assesses future learning needs			
Plans learning activities			
Seeks supervisor/manager input to development needs			
Monitors learning outcomes			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Subscribes to industry magazines/newsletters			
Searches the internet			
Reads product/services information			
Attends conferences/seminars			
Question 9			
Explains performance review policy			
Performance review schedule – monthly, quarterly, annually			
Review documents/templates			
Training analysis			
Training assessment			
Identification of skills gaps			
Planning development activities			
Monitoring learning outcomes			

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RECORD OF CONVERSATION

BSBCMN305A Organise workplace information

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 10: Provide two (2) examples of information you have distributed to others. What format was it distributed in? How was the information collected and how did you ensure it was up-to-date?

Question 11: Describe how paper and electronic information is stored in your organisation. What are the protocols for accessing client data? What are the information management protocols that relate to the secure storage of client information?

Question 12: How do gain feedback from others about the sufficiency of the information available and its relevance for decision making. What changes have been made as a result of feedback?

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 10			
Format hard copy – memo, newsletter, letter, etc electronic – email, presentation, etc	Legislation Company policies and procedures		
Accesses paper-based or electronic information	Workplace documentation		
Accesses intranet	Data management		
Interviews others			
Discusses activities with others			
Undertakes research			
Ensures documents are the latest version			
Checks no changes to documents are planned in the near future			
Ensures the information is sufficient and accurate			
Question 11			
Electronic procedures for storage in directories, sub directories, back-up copies, network system			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Storage on compact disks, hard or floppy disks, back-up systems			
Filing of hard copies of correspondence, computer generated documents			
Procedures for changing, saving, formatting and naming documents			
Procedures for privacy and security of documents and files			
Accesses data following procedures – privacy, storage, safe storage, administration systems, maintenance			
Question 12			
Discusses information at team meetings			
Organises focus groups to review information needs			
Asks others to advise of changes to information			
Identifies gaps in information needs			
Identifies problems accessing information			
Seeks customer input if relevant to information			
Changes information after assesses feedback			
Changes are relevant to organisation goals and objectives			

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RECORD OF CONVERSATION

BSBCMN306A Produce business documents

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 13: Describe three (3) documents you have produced recently at work and the design format of each document. What technology and software did you use? What information did you access to complete the document?

Question 14: How have you ensured completed documents meet quality standards and task requirements?

Question 15: Explain a time you had difficulty producing a document due to lack of knowledge of a software package and how you overcame this.

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 13			
Documents text documents – letters, memos, reports, newsletters spreadsheets – budgets, financial reports, costings database reports	Legislation Company policies and procedures Workplace documentation Data management Information technology		
Design includes – styles, headers/footers, bullets, numbering, font, page set up			
Technology – computer, printer, scanner			
Software relevant to business documents e.g. Word, Excel, Access, PowerPoint			
Accesses information (policy, procedures, work instructions, forms, internet)			
Question 14			
Proofreads the document carefully			
Checks task requirements against document			
Checks layout before printing using print preview			
Checks layout after printing			
Stores document appropriately			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 15			
Explains difficulty with software function			
Seeks online help			
Sources software manual			
Reads training manual			
Calls help desk			
Calls software supplier			

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RECORD OF CONVERSATION

BSBCMN307A Maintain business resources

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 16: Describe a time you were asked to estimate future equipment and resource requirements and how you went about producing the estimate.

Question 17: Explain your organisation's procedures for acquiring equipment and resources.

Question 18: What impact would a shortage of resources have in your workplace? How are resources monitored to ensure a shortage does not occur?

Question 19: Discuss the safe work practices you have implemented when using equipment.

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 16	Company policies and procedures Productivity Budgets Supplier information and manuals Waste management		
Assesses current equipment and resources held			
Reviews trends in usage			
Calculates period of time of usage			
Consults with supervisor/manager and work team			
Takes in to account future workload and resource requirements			
Considers impact of shortage			
Estimates based on numbers, costs, suppliers quantities			
Question 17			
Obtains approval for purchase			
Obtains quotes			
Reconciles purchase documents/invoices			
Checks asset received for quantity and quality compliance			

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KEY POINTS The candidate's response should evidence the following	INDUSTRY REQUIREMENTS These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	COMMENTS Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Submits invoice to accounts			
Question 18			
Loss of productivity			
Failure to meet timelines			
Blockages in work activities			
Failure to meet customer service needs			
Monitors resource usage trends and period of usage			
Monitors equipment through counters, timers, periods between servicing, size of files			
Question 19			
Reads operation manuals			
Follows ergonomic guidelines			
Keeps work area clean and free of hazards/obstacles			
Uses safe manual handling procedures			
Reports unsafe work practices			
Supports management in complying to procedures			

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RECORD OF CONVERSATION

BSBCMN308A Maintain financial records

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 20: Tell me about the steps you have taken to prepare and process four (4) different financial documents in your workplace.

Question 21: How do you ensure accuracy of records?

Question 22: List the journals you have prepared and the corresponding source for each.

Question 23: Describe the process you have used to record account payments received and payable accounts.

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 20	Legislation and codes of practice Company policies and procedures Privacy and confidentiality Information technology Audit requirements Data security Accounting standards		
Checks and verifies information on documents			
Records information			
Referes irregularities or questions to nominated person			
Banking documents – enters, balances, checks and reconciles			
Petty cash – checks voucher/claim, processes, records and balances			
Invoices – prepares, checks, corrects and files			
Questions 21			
Checks information on document			
Entries are checked against original source			
Checks balance during process			
Reconciles accounts after entering data			
Checks discrepancies with appropriate personnel			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 22			
Cash receipts			
Cash payments			
Sales and sales returns			
Purchases and purchases returns			
General			
Question 23			
Account payments			
Checks payment with invoice/statement details			
Prepares receipts			
Enters payment into accounts receivable ledger			
Pay accounts			
Checks date due			
Checks invoice/statement details			
Prepares cheque requisition			
Attaches invoice/statement and forwards to accountant/designated employee			
Prepares cheque			
Enters payment into accounts payable ledger			

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RECORD OF CONVERSATION

BSBCMN309A Recommend products and services

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 24: Describe the products and services offered by your organisation and discuss how you keep your knowledge current on these products and services.

Question 25: Tell me about a time you recommended products and services to a customer. Where did you source information on the product/service and what factors did you consider in your recommendation?

Question 26: In advising on promotional activities of products/services, what types of advice have you provided and what data did you base your advice on?

Question 27: What types of feedback has your company collected on promotional activities of products and services and how was the feedback used to plan future activities?

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 24	Legislation Industry standards Company policies and procedures Business communication skills Customer special needs		
Describes products and services features and characteristics			
Reads product manual			
Learns about services features and offerings			
Seeks information on internet/intranet			
Talks to industry associations			
Attends conferences			
Seeks supplier information			
Researches competitors product and service information			
Question 25			
Discusses product and/or service recommended			
Sources information from company product/service			

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KEY POINTS The candidate's response should evidence the following	INDUSTRY REQUIREMENTS These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	COMMENTS Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
database			
Sources information from hard copy product/service specifications			
Refers to personal copies of catalogues and price lists			
Shows brochures and information cards/flyers			
Considers company requirements – availability of stock, service availability, sales targets, budgets			
Considers customer needs – price range, product quality, service delivery standards, delivery options			
Question 26			
Most appropriate types of promotional material			
Cost of promotional activities within budget resources			
Target groups			
Based on			
Knowledge of product/service			
Knowledge of customer group			
Customer feedback/surveys			
Sales figures/trends			
Returned goods			
Lost customers			
Complaints			
Question 27			
Unsolicited feedback – verbal or written			
Customer surveys/questionnaires			
Suggestion box			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Feedback used to			
Repeat or improve upon what has worked well in the past			
Improve promotional activities			
Use financial and other resources more effectively			

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RECORD OF CONVERSATION

BSBCMN310A Deliver and monitor a service to customers

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 28: Describe a time you have helped a customer and satisfied their needs. How did you clarify their needs? How did you ensure these needs were met in a timely manner?

Question 29: Explain the types of activities your organisation has undertaken to identify needs and expectations of customers.

Question 30: Discuss a customer complaint you have dealt with. What did you do to ensure the customer was satisfied and that a similar complaint did not reoccur?

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 28			
Treats customer with respect and courtesy	Legislation		
Uses appropriate body language	Legal requirements		
Summarises and paraphrases to check understanding	Organisation's strategic objectives and plans		
Provides customer the opportunity to confirm request			
Seeks feedback from the customer	Company policies and procedures		
Questions to clarify and confirm needs	Job descriptions		
Listens actively to the customer			
Follows company guidelines			
Assesses customers' needs with urgency			
Identifies customers with special needs			
Determines priority for service/product delivery			
Escalates request where required			
Monitors process for effectiveness			

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KEY POINTS The candidate's response should evidence the following	INDUSTRY REQUIREMENTS These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	COMMENTS Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 29			
Point of sale communication (service calls)			
Customer surveys, questionnaires or forums			
Market research, focus groups and studies			
Quality assurance and audit data			
Returned goods and complaints			
Interview current, new or lapsed customers			
Media, industry associations, peak bodies			
Analyses and review data collected			
Question 30			
Listens to complaint			
Paraphrases for clarification			
Apologises and acknowledges customer feelings			
Explains the complaint process			
Records relevant information			
Offers alternative and negotiates positive outcomes			
Refers to appropriate personnel			
Monitors outcome and delivery of product/service			
Checks back with customer to ensure satisfaction			
Notes compliant for improvement			
Reports complaint to management			
Discusses options for improvement with appropriate personnel			
Seeks approval and implements improvement			

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RECORD OF CONVERSATION

BSBCMN311A Maintain workplace safety

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 31: Describe a hazard you have identified in your workplace and what you did to control or remove the hazard. How did you record this?

Question 32: Explain how you apply safe work practices in your immediate work area.

Question 33: How is workplace health and safety monitored in your workplace and how have training needs been identified?

Question 34: Describe your workplace emergency evacuation procedures. (Assessor prompts: What are the different building alarms? Where is the nearest exit? What is the evacuation route? Where is the congregation point? Who are the key personnel eg. floor wardens, safety officers? When was the last fire drill / evacuation drill?)

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 31			
Identifies hazard	Legislation		
Uses hazard sign	Legal requirements		
Follows procedures to control or remove the hazard	Company policies and procedures		
Applies company health and safety procedures	Industry standards		
Reports hazard on appropriate forms to designated personnel	Risk management		
Question 32			
Follows safe work practices			
Follows ergonomic guidelines			
Keeps work area clean and free of hazards/obstacles			
Uses safe manual handling procedures			
Reports unsafe work practices			
Supports management in complying to procedures			
Participates in emergency/fire drills			

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KEY POINTS The candidate's response should evidence the following	INDUSTRY REQUIREMENTS These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	COMMENTS Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 33			
Holds regular WHS meetings			
Encourages employees to raise issues			
Deals with issues promptly			
Encourages employees to assist with management			
Uses employee feedback to improve WHS management			
Identify training needs			
Checks awareness of training provided			
Assesses training outcomes			
Monitors team discussions on WHS			
Evaluates currency of training			
Undertakes questionnaire with team members			
Question 34			
Describes evacuation procedure			
Identifies various alarms (alert tone, evacuation tone)			
Identifies evacuation route			
Identifies exits			
Names congregation point			
Identifies key personnel			

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RECORD OF CONVERSATION

BSBCMN312A Support innovation and change

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 35: Discuss a change to work practices implemented in your workplace. How was the need for change identified and how was the change implemented?

Question 36: Describe an innovative idea you have had to improve work practices. What guidelines did you follow when considering the idea and how did you source feedback on the idea?

Question 37: How has business technology been used in your workplace to support implementation of change?

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 35			
Management recommendation or decisions (e.g. relocation, downsizing, new priorities)	Legislation Codes of practice Organisation's strategic objectives and plans Company policies and procedures Job descriptions Access and equity practices		
Technical, market, organisational or resource changes or uncertainty			
Corporate research and development			
Organisational restructuring, staffing changes			
Introduction of new technology or products			
Continuous improvement programs			
Employee or team suggestions or interviews			
Market demands; new client base			
Analysis of qualitative/quantitative data			
Brainstorming and feedback			
Implement change			
Creates a readiness to change			
Creates shared vision and common direction			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Develops leadership			
Implements mentoring and coaching programs			
Builds the ability to change – prepares management, develops implementation plan, monitors change implementation			
Promotes participation and consultation with individuals and teams			
Encourages teams and asks for feedback			
Promotes positive attitude			
Question 36			
Values contribution of others			
Integrates different points of view			
Ensures idea is realistic			
Ensures idea relates to work practices and company goals			
Ensures idea is clear, correct and complete			
Ensures idea meets company guidelines			
Identifies risk factors and potential constraints			
Provides recommendation for success of change			
Feedback			
Customer survey			
Interviews			
Comments from colleagues			
Analysis of qualitative/quantitative data			
Recommendations			

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KEY POINTS The candidate's response should evidence the following	INDUSTRY REQUIREMENTS These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	COMMENTS Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Management decisions			
Knowledge management systems			
Quality assurance data			
Question 37			
Computers and computer applications: project planning, scheduling, cost control tools maintain change control to documents, assets, policies, processes, procedures foster knowledge management generate charts, diagrams, reports quality assurance and quality control			
Communications – iPod, email, fax, chat			
Internet, extranet, intranet			
Electronic whiteboards, PowerPoint presentations			

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RECORD OF CONVERSATION

BSBCMN313B Maintain environmental procedures

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 38: Describe your organisation's environmental policies and procedures. How have you ensured your work practices meet the requirements of these policies?

Question 39: Discuss your role and responsibilities in identifying environmental hazards and assessing risk in your area. What types of reports are you required to complete (both internal and external)?

Question 40: Provide three (3) examples of environmental risks you have identified in your work area.

Question 41: What training have you undertaken on environmental procedures and what did the training cover?

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 38			
Hazard and risk identification	Legislation and Acts		
Avoid or minimise risk and waste	Codes of practice		
Environmental signage and labelling	Company policies and procedures		
Environmental auditing			
Environmental aspects of product standards	Australian Standards		
Environmental work practices – responsibilities and planning			
Record keeping and reporting procedures			
Work practices			
Treats actual hazards and risks			
Prevents or minimises pollution and wastage			
Sets relevant environmental targets			
Uses eco-friendly substances, non toxic			
Follows workplace procedures and instructions			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 39			
Monitors and records environmental performance for own work area			
Decides which activities needs documented procedures (risk, complexity, skill, frequency)			
Administer procedures and requirements for suppliers and contractors			
Identifies and assesses existing and potential environmental risks			
Rectifies risks if safe to do so			
Records and reports to designate personnel			
Supports management in the implementation and management of policies and procedures			
Reports			
Measurements of environmental performance			
Details of environmental hazards			
Details of environmental polices and strategies			
Assessment of environmental polices and strategies			
Details of potential and existing environmental risks assessment and identification			
Comments and responses – including internal and external sources			
Question 40			
Incorrect resource use – paper, cardboard, office equipment, electricity			
Poor energy management – heating, cooling, office			
equipment, lighting, water heating			

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KEY POINTS The candidate's response should evidence the following	INDUSTRY REQUIREMENTS These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	COMMENTS Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Incorrect purchasing – office stationary, batteries, printer cartridges, photocopiers, computers, furniture, paper, printing, cleaning services			
Transport – couriers, company cars, commuting to work, freight deliveries			
Waste – paper, glass bottles, aluminium cans, hand towels, obsolete office equipment, light bulbs, organic waste			
Question 41			
Formal training – workshops, seminars			
Informal training – one-on-one			
Organisation wide – general awareness training			
New and changed environmental procedures and initiatives			
Use of equipment			
Purchasing environmentally friendly products			
Specific procedures e.g. toner cartridge recycling			

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RECORD OF CONVERSATION

BSBCMN314A Utilise a knowledge management system

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 42: Describe your organisation's knowledge management system and the information you were provided on how to use the system.

Question 43: When inputting data, what measure do you take to ensure errors do not occur? What do you do if an error does occur?

Question 44: Provide two (2) examples where work practices in your organisation were improved as a result of feedback from the use of the knowledge management system.

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 42			
Planned system to manage knowledge within the organisation and among stakeholders	Legislation and Acts Codes of practice Company policies and procedures Data management Information technology		
Comprises range of strategies, methods, activities and techniques to manage knowledge			
Used to identify, collect, organise, store, retrieve, analyse, share and apply knowledge			
Operating instructions and user manuals			
Templates for collection of input to the system			
Criteria for the selection and filtering of input to the system			
Procedures covering data collection, storage and retrieval, privacy and confidentiality, quality			
Question 43			
Prepares input in line with the system			
Checks input for accuracy, clarity, currency and relevance			
Checks system for input errors			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Provides feedback on input and the system			
Reports errors to supervisor/manager or designated personnel			
Question 44			
Decisions are based on more valid, reliable and timely information			
Ethical, legal and policy requirements are seamlessly integrated in to decision making			
Knowledge serves as a unifying concept for cross-functional issues and interactions			
Knowledge management concepts and products can impact on streamlining organisation and systems			

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RECORD OF CONVERSATION

BSBCMN315A Work effectively with diversity

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 45: Describe individual differences you have encountered in your workplace amongst colleagues and customers. How have you shown you value diversity?

Question 46: How have you encouraged individuals in your team to use their special qualities, skills or backgrounds to enhance work outcomes?

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 45			
Age	Legislation and Acts		
Race/culture/language	Codes of practice		
Religion	Company policies and procedures		
Gender			
Sexual orientation	Code of conduct		
Personality			
Physical and mental abilities			
Interests			
Experience/skills			
Demonstrates respect for individual differences			
Responds sensitively to individual differences			
Does not repeat discriminatory jokes or gossip			
Ensures others are aware of organisation's attitude towards discrimination			
Question 46			
Recognises special qualities, skills or backgrounds			
Negotiates allocation of work tasks to take advantage of			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
individual differences			
Encourages those with special qualities, skills or backgrounds to coach/mentor others			
Encourages inclusion in work activities			

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RECORD OF CONVERSATION

BSBCMN316A Process customer complaints

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 47: In line with your level of responsibility, discuss a customer complaint you have handled and how you processed the complaint.

Question 48: How do you handle a complaint not within your scope of responsibility?

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 47			
Identifies nature of complaint and collects facts	Legislation and regulations		
Empathises and shows respect for customer	Company policies and procedures		
Documents complaint			
Identifies issues for resolution	Company products, policy terms and conditions		
Investigates the complaint and documents results	Communication skills		
Discusses options for resolution to suit customer and company guidelines	Customer relation procedures		
Turns complaint into opportunity for improvements	Information privacy		
Resolve complaint or refers to appropriate personnel	Code of conduct		
Documents all details of the complaint and outcome	Negotiation		
Question 48			
Identifies nature of complaint			
Empathises and shows respect for customer			
Documents complaint			
Explains level of complaint and reasons for referring			
Provides full detail to appropriate personnel to handle			

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RECORD OF CONVERSATION

BSBCMN317A Meet customer needs and expectations

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 49: In line with your scope of responsibility, discuss a customer enquiry you have handled and how you were able to meet their expectations.

Question 50: What details did you require from the customer in order to process their enquiry and how did you record them?

Question 51: When taking a customer order, how have you determined availability of products/services required?

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 49			
Obtains details of enquiry – needs and expectations	Legislation and regulations		
Provides details of products and services related to customer needs	Company policies and procedures		
Asks questions around customer needs and expectations	Company products, policy terms and conditions		
Researches information suitable to help customer and meet needs	Communication skills		
Develops a suitable response (including any particular information disclosure requirements required ethically or legally)	Customer relations procedures		
Recommends products/services in line with customer enquiry – features and benefits			
Communicates response to customer (written or verbal)			
Treats customer appropriately			
Converses with customer further if required			
Processes order/booking (if required)			
Checks/follows up customers satisfaction			
Records details of enquiry/order			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 50			
Customer enquiry			
Customer needs/special needs			
Customer details- name/address/contact numbers/financial details/policy number/plan number/account number/etc			
Follow up details			
Records details in line with company procedure			
Records or updates details on customer file			
Question 51			
Accesses database of stock levels			
Accesses individual stock cards			
Contacts store person			
Contacts supplier			
Accesses relevant appointment/service book to determine if specific time is available to provide service			
Contact service provider/s			
Contact relevant personnel			

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RECORD OF CONVERSATION

BSBCMN318A Write simple documents

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 52: Discuss three (3) examples of simple documents you have written. What factors did you consider when planning the document? What resources did you access to identify organisation requirements for the document? How did you decide what to include as content?

Question 53: What details have you or your supervisor checked when proofreading a draft document? How did you ensure the changes were made before sending?

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 52			
Describes document and format – letter, memo, email	Legislation Company policies and procedures Data and records management		
Planning			
Purpose of document			
Audience (i.e. recipient)			
Subject (key points)			
Method of communication (i.e. language style)			
Means of communication (e.g. software package)			
Resources			
Policies and procedures for document writing			
Style guide			
Document templates			
Examples completed documents			
Content			
Reference to original document (date and subject)			
Key points			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Additional information required for clarification			
Question 53			
Appropriateness of language, tone and communication style for audience			
Meets intended purposes			
Format			
Readability			
Grammar (including sentence and paragraph construction)			
Spelling			
Sequencing and structure			
Organisational requirements			
Clarifies changes required if necessary			
Makes all changes			
Checks all changes			
Proofreads revised document			

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RECORD OF CONVERSATION

BSBCMN319A Apply advanced first aid

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 54: When responding to a first aid incident, what types of hazards and risks to self and others do you need to be aware of?

Question 55: List the skills and attributes required of an advanced first aid officer.

Question 56: Outlines your organisation's policies and procedures on first aid delivery – including maintenance of resources and equipment, first aid management of delivery and administration of medication.

Question 57: Discuss an emergency situation you have attended to - initial steps taken, how you assessed and managed the situation, how you determined if medical assistance was required and procedures followed after the incident.

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 54	OHS Legislation and regulations Company policies and procedures Legal requirements Duty of care First Aid principles Environment acts and regulations Confidentiality		
Hazards			
Workplace/Environmental hazards			
Electrical hazards			
Fire			
Chemical or gas spillage			
Proximity of other people			
Hazards associated with the casualty management processes			
Risks			
Worksite equipment, machinery and substances			
First Aid equipment (oxygen cylinders, defibrillator)			
Environmental Risks			
Body fluids			
Risk of further injury to the casualty			

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KEY POINTS The candidate's response should evidence the following	INDUSTRY REQUIREMENTS These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	COMMENTS Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Risks associated with the proximity of other workers and bystanders			
Question 55			
Ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities			
Resuscitation			
The use of a semi-automated defibrillator			
Delivery of oxygen			
Demonstration of first aid principles			
Adequate infection control procedures			
Safe manual handling			
Consideration of the welfare of the casualty			
Initial casual assessment			
Report preparation			
Communication skills			
Incident management skills			
Ability to interpret and use listed documents			
Transport techniques			
Assertiveness skills			
Leadership			
Decision making			

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KEY POINTS The candidate's response should evidence the following	INDUSTRY REQUIREMENTS These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	COMMENTS Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 56			
Use resources and equipment appropriate to the risk at the incident			
Maintain resources ready for deployment at all times			
Seek agreement for management of casualty's injury/illness from relevant persons			
Determine and implement welfare procedure according to casualty needs			
Remove casualty from further harm is possible			
Control effects of injury			
Determine and apply first aid management			
Monitor and respond to casualty condition in a timely manner			
Finalise management according to casualty(s) needs and First Aid principles			
Administer medication according to legislation and manufacturer's instructions			
Record medication administered			
Monitor further administration of medication			
Question 57			
Deploys correct amount of resources			
Establishes a communication link			
Logs resources, communication and activities			
Assesses risk and hazards			
Assesses environmental conditions			
Locates emergency personnel (if on site)			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Evacuates casualties if required			
Assesses number of casualties			
Determines an action plan			
Assesses need for medical assistance based on casualty condition			
Undertakes communication with medical assistance			
Evaluates casualty's and environmental conditions to determine transport needs			
Reports on medication given/treatment – symptoms, fluid intake/output, notices blood, vomit, faeces, urine/time, date, person administering, dose/vital signs			

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RECORD OF CONVERSATION

BSBCMN320A Maintain first aid equipment and resources

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 58: Discuss your organisation's procedures around availability, storage and security and maintenance of first aid resources and equipment.

Question 59: Explain the methods used to recover and clean reusable first aid and/or medical equipment and disposal of contaminated medical waste.

Question 60: Outline required records, forms and books you have completed and discuss the internal and external reporting procedures you have followed.

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 58	Legislation and regulations WHS Act Australian standards Company policies and procedures Waste management Environmental acts and regulations Confidentiality		
Store First aid equipment in readily accessible first aid room/s			
Identify kits with appropriate signage			
Authorised First Aider maintains a kit at workstation			
Securely store medication and other resources			
Clearly display names of First Aiders in the workplace			
Keep resources operationally ready			
Store resources according to manufacturer's instructions			
Check stock regularly for currency and record			
Inspect equipment regularly for condition, operability and currency			
Question 59			
Cleans, disinfects and sterilises reusable medical and surgical instruments and equipment			
Cleans and maintains first aid environment			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Segregates waste at the source – sharp containers, biohazard bins, general waste and colour-coded bins			
Separates waste streams			
Stores and transports waste – cold storage for contaminated waste and transport in safe leak proof container			
Treats waste – sterilisation of contaminated waste			
Disposes of waste – local council approved, engineered, sanitary landfill, waste collection and disposal services			
Question 60			
Internal			
Equipment and resources usage forms/log			
Incident logs			
Treatment book			
First aid and health surveillance report			
Risk and hazards assessment report			
Health records			
Medication administration log			
External			
Incident Notification Form – serious bodily injury, work-caused illness, dangerous events			
Notification of a death			
Electrical Safety Office form – serious electrical incident or dangerous electrical events			

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RECORD OF CONVERSATION

BSBFLM303B Contribute to effective workplace relationships

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question 61: Describe a time when you have used your communication skills to relay information; for example, making a presentation, selling the benefits of a financial services product, negotiating with supplier or advocating on behalf of clients. What techniques did you use to ensure a positive outcome?

Question 62: Explain the action you have taken when a problem was identified in your team. How did you contribute to a positive outcome?

Question 63: How have you minimised issues and difficulties that may have occurred because of workplace misunderstandings due to cultural or personal differences?

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question 61			
Gains information required – instructions, records, policy, procedure	Company policy, guidelines and procedures		
Uses information to suit the purpose	Assistance sought from appropriate personnel		
Seeks clarity or further information			
Uses appropriate speech and language	Discrimination guidelines		
Uses suitable communication technique – face-to-face, written, verbal, non-verbal, technology based	Effective communication techniques		
Relays information – presents, sells benefits, negotiates, advocates	Written communication and company documents		
Confirms understanding of information	Recording systems		
Correspondence is prepared as required	Industry legislation, regulations and codes of practice		
Techniques			
Uses effective and appropriate communication skills			
Shows respect and sensitivity to others			
Defines own role in achieving outcomes			

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KEY POINTS The candidate's response should evidence the following	INDUSTRY REQUIREMENTS These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	COMMENTS Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Cooperates with others			
Negotiates outcomes			
Problems solves			
Contributes to discussion appropriately			
Question 62			
Interacts with other to identify problem			
Reflects on current practices and recognises where improvements are required in own work area (eg minimising waste, streamlining processes, avoiding duplication)			
Offers suggestions			
Analyses possible solutions			
Contributes to decision making			
Manages self within the problem solving process			
Supports in implementing change within task			
Encourages and supports others			
Carries on to complete task with team			
Collaborates with team to implement change			
Question 63			
Respects difference in cultures/customs/personal situations			
Practices cultural inclusion			
Avoids bias and stereotyping			
Adopts a sensitive approach			
Uses simple directions and instructions			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Speaks slowly for those whose are from NESB			
Resolves misunderstandings/conflict			
Uses positive gestures and body language			

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SPECIALIST ADMINISTRATION UNITS

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RECORD OF CONVERSATION

BSBADM301A Produce text from shorthand notes
BSBADM302A Produce text from notes
BSBADM303A Produce texts from audio transcription

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question A1: Describe a document you have produced from shorthand notes, notes or audio transcription. How did you prepare to take notes? What checks did you make on the notes? What did you do to ensure accuracy?

Question A2: How have you handled a situation where the author dictates names and terms with which you are not familiar or you have difficulty understanding the author?

Question A3: Think of a time when you wrote a proposal, a report, or provided written advice to a client. What are some of the factors you considered when planning the document? What reference material do you access to ensure the information you communicated was accurate and complete?

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question A1			
Describes document prepared – letter, memo, report, newsletter, minutes of meetings	Legislation Company policies and procedures Workplace documentation Data management Information technology Standards Australia Shorthand Speed A52097 - 1986		
Sources notepad, pencil/pen or prepares audio equipment			
Ensures sitting position is appropriate			
Clarifies document and its purpose with author			
Takes notes and abbreviates for speed			
Checks notes after dictation – meaning, punctuation, wording			
Checks timeframes for completion			
Transcribes shorthand notes, notes or audio transcription carefully			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Records shorthand notes at minimum of 60 words per minute			
Reads text/document for meaning			
Proofreads and checks text/document with author			
Keeps shorthand notes, notes or audio transcription for reference			
Prints document and seeks signature (if required)			
Files copy of document			
Question A2			
Clarifies meaning or unclear speech			
Asks author to spell words			
Predicts text from context			
Refers to files/document with similar wording/meaning			
Clarifies names and terms from industry documents			
Question A3			
Describes document and information to go in the document			
Format of document – refers to style guide, templates, policies and procedures			
Audience receiving the document			
Clarity and accuracy of information			
Document recording systems			
Industry and organisation standards			
Policies and procedures relating to the document			

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RECORD OF CONVERSATION

BSBADM304A Design and develop text documents

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question A4: What are some of the ergonomic practices you routinely apply when using computers?

Question A5: In designing a text document, what factors have you considered, what advanced functions have you used and how have you ensured its readability?

Question A6: How have you ensured documents met quality standards, timelines and electronic storage procedures?

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question A4			
Workstation height and layout	Legislation		
Chair height, seat and back adjustment	Company policies and procedures		
Footrest	Workplace documentation		
Screen position	Data management		
Keyboard and mouse position	Information technology		
Document holder	Wast management		
Posture			
Avoiding radiation from computer screens			
Lighting			
Question A5			
Factors			
Requirements of task/author			
Purpose of document			
Audience			
Information requirements			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Readability			
Appearance			
Balance			
Positioning of graphics			
Organisational requirements			
Advanced functions			
Creation/use of templates			
Headers and footers/page numbering			
Styles			
Font styles and sizes			
Tables			
Readability			
Font size and type			
White space			
Bulleted/numbered points			
Headings			
Placement of graphics			
Consistency			
Question A6			
Quality standards			
Proofreads the document carefully			
Checks task requirements against document			
Checks layout before printing using print preview			
Checks layout after printing			

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KEY POINTS The candidate's response should evidence the following	INDUSTRY REQUIREMENTS These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	COMMENTS Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Timelines			
Prioritises tasks			
Uses software functions to enable efficient document production			
Seeks help with difficult software functions - online, software manuals, training manuals, help desk			
Estimates timeframe for completion			
Renegotiates timelines as necessary			
Electronic storage procedures			
Electronic procedures for storage in directories, sub directories, back-up copies, network system			
Storage on compact disks, hard or floppy disks, back-up systems			
Procedures for changing, saving, formatting and naming documents			
Procedures for privacy and security of documents and files			
Accesses data following procedures – privacy, storage, safe storage, administration systems, maintenance			

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RECORD OF CONVERSATION

BSBADM305A Create and use databases

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question A7: Discuss three (3) databases you have created. How did you decide what information should be included in the database?

Question A8: Discuss how you have used a database to input data, run queries and generate reports.

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question A7	Legislation Company policies and procedures Workplace documentation Data management Information technology		
Identifies a minimum of three databases created (Using databases without creating them is not sufficient to meet the requirements of this unit)			
Identifies what information needs to be captured and designs database accordingly			
Creates tables in design view, using wizard or by entering data			
Question A8			
Opens existing database			
Inputs data as required, or in batches			
Checks any data input against source documents			
Saves changes			
Uses software functions eg filters, formulae, relabelling field, etc			
Identifies search parameters and uses software accordingly			
Uses tables, forms and report wizards			
Uses data export functions			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Generates reports and checks output meets requirements			
Applies formatting to reports/data			

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RECORD OF CONVERSATION

BSBADM306A Create electronic presentations

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question A9: In creating an electronic presentation, describe the factors you have considered regarding content, design and organisational requirements.

Question A10: Aside from creating an electronic presentation, explain other factors you have considered as part of the presentation e.g. rehearsals, additional material requirements, room preparation.

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question A9			
Content	Legislation Company policies and procedures Workplace documentation Data management Information technology		
Purpose of presentation			
Audience			
Type of presentation (slide show, transparencies)			
Graphics and other illustrations			
Supporting documents (handouts)			
Equipment			
Timelines			
Design			
Font size and type for readability			
Visual balance			
Effective content presentation			
Colours			
Incorporation of graphics and other illustrations			
Transitions			
Animations			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Video clips/sound/music			
Organisational requirements			
Logos			
Standards design polices, style guide			
Task requirements			
Image requirements			
Question A10			
Rehearses or reviews content, order of slides, readability, pace and timing			
Prepares materials – speaker notes, handouts			
Prepares room – seating numbers, cleanliness, water, tea and coffee, catering, mints, pens and pads			

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RECORD OF CONVERSATION

BSBADM307A Organise schedules

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question A11: Describe the appointment and meeting scheduling system/s in your workplace including procedures, authority and access to diaries for other employees.

Question A12: Provide an example of a time you managed a meeting schedule for a group of people with conflicting appointments and priorities.

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question A11			
Describes system – electronic or paper-based	Legislation		
Accesses staff planning tools (to level of authority)	Company policies and procedures		
Identifies type of appointment	Time constraints		
Determines individual personnel scheduling requirements including recurring appointments	Productivity		
Prioritises appointment			
Clarifies appointment with individual personnel			
Describes authority level – to make firm appointments or tentative appointments with further consultation required			
Question A12			
Establishes availability and priorities of staff members (attendees)			
Determines availability of attendees			
Identifies time convenient to all attendees			
Records tentative meeting			
Consults with attendees			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Negotiates alternative times as required – identifies opportunities to reschedule			
Removes tentative meeting			
Records new meeting in attendees diaries			
Notifies all parties			

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RECORD OF CONVERSATION

BSBADM308A Process payroll

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question A13: Outline the breadth of your responsibilities in respect of processing payroll; that is, what are the various payroll functions you have performed?

Question A14: What end of year payroll processes have you managed?

Question A15: Detail a time when there was a problem with a staff member's pay – for example, wrong pay scale was applied, funds not deposited to the employee's bank account, etc. What interventions did you make to correct the problem?

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question A13	Legislation, codes and national standards Organisational structure and authority Company policies and procedures Deductions and allowances Taxation compliance Budgeting/ planning Confidentiality Security		
Prepares payroll registers			
Maintains employee details			
Processes documentation for new employees (TFN form, Centre link forms, etc)			
Performs payroll calculations,			
Manages leave			
Prepares journal entries and updates general ledger			
Performs social security and PAYE contribution calculations,			
Generate statutory reports,			
Produces payslips			
Generates reports – exception, leave, cost centre, management			
Analyses information by department, section and unit			
Calculates union contributions			
Processes superannuation contributions			

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KEY POINTS The candidate's response should evidence the following	INDUSTRY REQUIREMENTS These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	COMMENTS Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Process direct credits or cheques			
Performs reconciliations			
Prepares payments for annual and long service leave			
Prepares individual earnings records			
Prepares journal entries			
Updates general ledger			
Question A14			
Calculates and applies bonuses			
Calculates payroll accruals			
Generates group certificates			
Completes FBT processes and reporting			
Completes end of year clearing procedures			
Generates statutory government reports			
Commences system procedures for start of new financial year			
Question A15			
Takes details of enquiries/problem/discrepancy			
Checks payroll records/data provided			
Checks for discrepancies			
Checks payment details			
Makes amendment to payroll records			
Contacts necessary person/s to make amendments			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Holds over to next pay if unable to make changes immediately			
Contact employee with resolution/outcome			

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RECORD OF CONVERSATION

BSBADM309A Process accounts payable and receivable

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question A16: After entering creditor details, what steps have you taken to process an account for payment? Describe the process you follow for processing and entering accounts payable, from the receipt of the invoice to the payment.

Question A17: Discuss a situation where you have reversed an accounts payable entry, or processed an adjustment note or credit memo. What is the difference between reversing an entry, and processing an adjustment?

Question A18: How do you manage outstanding accounts payable to ensure the good business standing of your organisation with creditors?

Question A19: How have you identified bad or doubtful debt when reviewing accounts receivable? What are your organisation's recommended collection actions for each ageing bracket?

Question A20: What action have you taken to recover debt?

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question A16			
Checks data/invoice for discrepancies and rectifies if required	Legislation and compliance requirements		
Records creditor details	Industry codes of practice		
Encodes and records invoice	Company policies and procedures		
Requests authority for payment			
Obtains approval for payment	Legal systems and procedures		
Draws up cheque requisition	Computer and communication systems		
Identifies general ledger to draw against	Security measures		
Debits correct account	Accounting principles		
Prepares and completed creditor payment			
Prepares accounts paid report			

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KEY POINTS The candidate's response should evidence the following	INDUSTRY REQUIREMENTS These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	COMMENTS Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question A17			
Verifies information on credit note and supporting documentation			
Follows same steps as processing invoice			
Ensures credit note references original invoice on accounting system			
Reversing entries relate to documents already in the system			
Adjustment notes refers to accounting entries where new legal documents have been issued eg. Credit Note			
Question A18			
Receives monthly statement from creditor			
Investigates outstanding invoices			
Obtains copies of missing invoices and processes according to procedures			
Ensures creditor is advised of actions taken to clear the statement of overdue invoices			
Question A19			
Runs aged debtor report, or similar			
Checks receipts entered into accounts receivable			
Identifies incorrect entries			
Identifies discrepancies between monies owed and paid			
Reviews debtor ledger and investigates monies owed – against terms and conditions			
Seeks relevant information			
Verifies bad or doubtful debt with debtor and reason			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Completes appropriate report			
Takes action – mail 2nd copy stamped invoice "past-due" - letter demanding payment - telephone call to debtor - refer to debt collectors			
Understands and applies organisational collection procedures			
Question A20			
Reviews communication with client			
Plans recovery action			
Recovery action – liaison with client, letters of notice, advice to supervisors/managers/legal office, return of goods, legal action, plaint, dunning letter, letters of demand without prejudice, third party interventions, summons, write-offs			

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RECORD OF CONVERSATION

BSBADM310A Maintain a general ledger

CANDIDATE'S NAME: _____ **ASSESSOR'S NAME:** _____ **DATE:** _____

Question A21: In processing a journal entry, what have you checked, verified and prepared before entering the data?

Question A22: After entering and allocating the data, how did you check your accuracy?

Question A23: What are some of the typical processing errors you have encountered when processing journals?

Question A24: Explain a trial balance and the steps you have taken to prepare a trial balance.

KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Question A21	Legislation and compliance requirements Industry codes of practice Company policies and procedures Business communication Computer systems Security measures and accurate filing Accurate data entry Accounting principles		
Examines documents (suspense reports/reconciliations) for accuracy, completeness and authorisation			
Checks journal is accurate and complete			
Prepares journal in timely manner			
Seeks authorisation of journal			
Question A22			
Checks entry and allocation of data during processing			
Examines processing report			
Reconciles processing report			
Adjusts entries as required			
Checks again for reconciliation			
Question A23			
Journal entry incomplete			
Debits don't equal credits			
Posting incomplete			

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KEY POINTS The candidate's response should evidence the following	**INDUSTRY REQUIREMENTS** These must be evidenced in the candidate's response	Indicate if response addresses KP and IR	**COMMENTS** Record other key points and examples from conversation. Identify whether a practical assessment is warranted.
Budget not available			
Invalid / blocked account codes			
Control total errors			
Scheduling errors for recurrent journals			
System rules prohibit entry			
Posting period closed			
Question A24			
Trial balance is an accounting term for a report that lists the balances of all the accounts of a business at a given date.			
Trial balance can be produced at any time of the year (often monthly)			
Records debit balances and credit balances in separate columns			
Checks totals of two columns balance (should equal)			
Checks accuracy of postings			
Makes adjustments as required			
Prepares final trial balance			

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SECTION D

Practical Tasks and Observation Recording Sheets

You use this section to assist you in determining a candidate's competency in those areas where they have not yet successfully demonstrated their skills, knowledge and prior experience. Therefore, candidates are not required to complete all tasks. You select tasks after considering available evidence collected through previous phases and according to context and needs of each candidate.

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PRACTICAL TASKS

Candidates are **not** required to complete **all** tasks. The Assessor is to select tasks after considering available evidence collected through previous phases and according to the context and needs of each candidate.

Unit of Competency	Practical Task
BSBADM301A Produce text from shorthand notes **BSBADM302A** Produce texts from notes **BSBADM303A** Produce texts from audio transcription **BSBADM304A** Design and develop text documents **BSBCMN306A** Produce business documents **BSBCMN318A** Write simple documents	**Task 1** This task requires you to **(a)** write text in an email format and **(b)** design and produce a memo from notes, shorthand notes or audio transcripts (depending on the specific unit being assessed). Your assessor will read out text for 3 email messages and a memo to be distributed to employees – refer to Section E for practical task resources.
BSBADM307A Organise schedules	**Task 2** This task requires you to demonstrate how you schedule an appointment for 3 work colleagues to meet. In your workplace or a simulated environment access the diaries of 3 other staff members and arrange a meeting on Wednesday of the following week. Reschedule other conflicting appointments to ensure all 3 can attend.
BSBCMN302A Organise personal work priorities and development	**Task 3** In your workplace or a simulated environment show your assessor the tools and processes you use to organise and prioritise your workload. Included in this task you are required to show future planning you have implemented for you competency development.

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Unit of Competency	Practical Task
BSBCMN305A Organise workplace information **BSBADM306A** Create electronic presentations	**Task 4** This task requires you to collect, assess and organise information on your organisation's products and/or services in order to create an electronic presentation. Discuss with your assessor the products and services offered in your workplace on which you can create an electronic presentation.
BSBCMN304A Contribute to personal skill development and learning	**Task 5** This task requires you to gather workplace documents demonstrating how you have undertaken personal skill development and learning Examples **may** include: • Training/course registration forms • Professional Development Plan • Attendance at In house training • Performance appraisals you have undertaken • Feedback requested for improvement • Meeting minutes/evidence of participation in organisational planning sessions
BSBCMN314A Utilise a knowledge management system	**Task 6** This task requires you to access and use a knowledge management system in your workplace or a simulated environment. Show your assessor how the system is structured and • what sort of inputs you are responsible for and how they are entered • how you contribute to monitoring the system • any enhancements or improvements you have made or recommended to the system or in its use
BSBADM308A Process payroll **BSBADM309A** Process accounts payable and receivable **BSBADM310A** Maintain a general ledger **BSBCMN308A** Maintain financial records	**Task 7** Using a computerised accounting system in your workplace or a simulated environment demonstrated the following: **(a)** process payroll and show how you access information to handle payroll enquiries **(b)** process accounts payable and receivable **(c)** reconcile debtors and creditors subsidiary ledger with the General Ledger. **(d)** enter general ledger transactions/adjustments **(e)** process journal entries and prepare a trial balance

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Unit of Competency	Practical Task
BSBCMN309A Recommend products and services **BSBCMN310A** Deliver and monitor a service to customers **BSBCMN315A** Work effectively with diversity **BSBCMN316A** Process customer complaints **BSBCMN317A** Meet customer needs and expectations **BSBFLM303B** Contribute to effective workplace relationships	**Task 8** This task requires you to demonstrate your product/service knowledge, handle a complaint and maintain relationships for a positive outcome. Options • if you are being assessed in your workplace you may be able to help a customer and have your assessor observe you. In this case it may not be a complaint you handle but could be an enquiry or sale – read all the key points to demonstrate below before approaching a customer • if you are not being assessed in your workplace or there are no customers for you to interact with and be observed then refer to your records on a complaint you have handled in the past. Step through the complaint with your assessor discussing the key points below. Key points to demonstrate: **(a)** respond to a customer complaint or complex enquiry **(b)** identify needs and provide options **(c)** product/service knowledge – discuss any current promotions **(d)** delivery of product/service to meet needs **(e)** ability to maintain relationships with customer, team and networks **(f)** monitor the outcome to ensure customer satisfaction
BSBCMN319A Apply advanced first aid **BSBCMN320A** Maintain first aid equipment and resources	**Task 9** This task has two parts and requires you to demonstrate the application of advanced first aid skills and maintain first aid equipment and resources. **Part A -** Discuss with your Assessor the correct first aid treatment for the following: • Loss of consciousness • Minor cuts or abrasions • Burns/scalds • Fractures • Poisoning • Heart attack (demonstrate CPR) • Seizure • Electrocution ***(Note** - Assessor to record responses by using the checklist in Section E – Resources)* **Part B -** Access workplace documents that demonstrate how you have maintained first aid equipment and resources. Some examples **may** include: • Stocktake/re-order sheets for first aid kit • Service logs for medical equipment • Documents requesting approval for equipment supplies • Replacement of faulty equipment

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Unit of Competency	Practical Task
BSBCMN311A Maintain workplace safety	**Task 10** This task requires you undertake a walk around your workplace to identify and discuss any workplace hazards with your assessor. Some examples **may** include: • Your organisations workplace policy on occupational health and safety • Accident and injury recording forms • Equipment maintenance plan or service log records • Methods for identification of hazards and reporting of issue to appropriate personnel • Attendance at induction training/fire training/first aid training
BSBCMN301A Exercise initiative in a business environment **BSBCMN307A** Maintain business resources **BSBCMN312A** Support innovation and change	**Task 11** **Scenario** Graham, the Information Technology Manager has advised that the decision to introducing some new IT systems has been made. It has been negotiated that IT technicians will visit the workplace after hours to perform the installation. Graham has requested that you assist with the administrative functions required to manage this task. Your involvement requires the purchasing of 7 new computers, consulting with staff, managing the scheduling of work, coordinating and monitoring work requirements. Administrative staff are unaware that this decision has been made, but they have been requesting an upgrade for several months. Outline and discuss with your Assessor what you would do to: **(a)** communicate with the administration team **(b)** order required new computers for installation by technicians **(c)** schedule work with technicians **(d)** advise staff of details such as date, time of roll-out etc **(e)** assist staff prepare current environment ready for transition **(f)** facilitate entry of IT technicians to the building after hours **(g)** ensure appropriate lists, check sheets were provided to IT technicians **(h)** provide support after the upgrade.
BSBADM305A Create and use databases	**Task 12** Create a new customer database using information available at your workplace. You are required to: **(a)** in design view, create a form to assist in data entry **(b)** add a form header to describe what the database is recording **(c)** apply a simple formula to calculate any totals **(d)** prepare a query (discuss with your Assessor) **(e)** prepare a report (discuss with your Assessor) **(f)** insert your name in the report footer (centred), print a copy and submit to the Assessor **(g)** store the document electronically.

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OBSERVATION RECORDING SHEET

Practical Tasks

CANDIDATE'S NAME: _____ **SIGNATURE:** _____ **DATE:** _____

ASSESSOR'S NAME: _____ **SIGNATURE:** _____ **DATE:** _____

LOCATION: _____

NB: The skills listed below must be verified by a competent assessor through observed demonstration either in the candidate's workplace as part of the candidate's normal work duty OR as part of a practical assessment/demonstration set by the assessor.

Unit and element covered in task	Task No.	Observable behaviours in task	Industry requirements	Assessor's comments	Indicate if behaviour observed	Date assessed
BSBADM301A 1, 2, 3 BSBADM302A 1, 2, 3 BSBADM303A 1, 2, 3 BSBADM304A 1,2, 3	**1a**	Prepares to take notes, shorthand (60 words/minute) or audio transcription Clarifies purpose and requirements of the text/document Records notes in timely manner Clarifies terms or information not understood Produces text from notes Edits and revises text	Legislation Company policies and procedures Workplace documentation Data management Information technology			
BSBCMN306A 1, 2, 3 BSBCMN318A 1, 2, 3, 4	**1b**	Prepares to take notes, shorthand (60 words/minute) or audio transcription Clarifies purpose and requirements of the text/document Records notes in timely manner Clarifies terms or information not understood Selects a plan resources Plans and designs document	Legislation Company policies and procedures Workplace documentation Data management Information technology			

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Unit and element covered in task	Task No.	Observable behaviours in task	Industry requirements	Assessor's comments	Indicate if behaviour observed	Date assessed
		Edits and reviews document Produces document and stores securely according to requirements				
BSBADM307A 1, 2	**2**	Accesses diary of other staff members Determines individual diary requirements Established availability of staff members Enters meeting time Reschedules conflicting appointments Records new appointments Confirms with attendees	Legislation Company policies and procedures Time constraints Job description			
BSBCMN302A 1, 2, 3	**3**	Discusses work objectives Assesses workload Accesses tools/technology to organise workload Prioritises workload Plans for contingencies Monitors work outcomes Seeks feedback Assesses training and development needs Plans opportunities for competency development of own skills	Legislation Company policies and procedures Productivity Time constraints Business technology			
BSBCMN305A 1, 2, 3 BSBADM306A 1, 2, 3	**4**	Applies correct ergonomic requirements (chair heights, screen position, posture, lighting, etc) Creates new file Uses design view to create form Enters data	Legislation Company policies and procedures Workplace documentation			

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Unit and element covered in task	Task No.	Observable behaviours in task	Industry requirements	Assessor's comments	Indicate if behaviour observed	Date assessed
		Checks accuracy Applies simple formulae to calculate totals Applies search query correctly Generates reports and checks output meets requirements Applies formatting to report Prints and saves file Establishes method of collecting information Collects information Assesses information and how it relates to the presentation Determines format of information Accesses technology to produce presentation Organises information to suit audience, format purpose of the presentation Enters information on presentation Reviews information on the presentation Asks for feedback Information stored securely according to requirements	Data management Information technology			
BSBCMN304A 1, 2, 3	**5**	Accesses policies, procedures and other documents relating to employee development and learning Identifies own learning needs Undertakes skills development based on needs Seeks feedback Monitors learning outcomes	Legislation Company policies and procedures Industry standards Organisation philosophy, values and objectives			

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Unit and element covered in task	Task No.	Observable behaviours in task	Industry requirements	Assessor's comments	Indicate if behaviour observed	Date assessed
BSBCMN314A 1, 2, 3, 4	**6**	Accesses the knowledge management system Uses the KM system Gathers, analyses and prepares information for input Makes input/s Checks for accuracy and currency Discusses enhancements to the systems or improvements to work practices	Legislation and Acts Codes of practice Company policies and procedures Data management Information technology			
BSBADM308A 1, 2, 3	**7a**	Checks and records payroll data Calculates and prepares payroll Reconciles payroll Corrects errors Arranges payment Seeks authorisation for payroll Produces payroll records and stores records securely Handles payroll enquiries	Legislation, codes and national standards Company policies and procedures Deductions and allowances Taxation compliance Confidentiality Security			
BSBADM309A 1, 2, 3, 4, 5, 6	**7b**	*Maintains financial journals* – checks, enters, reconciles and totals transactions *Prepares bank reconciliation* – checks, updates, reconciles and totals journals Prepares reconciliation report *Maintains accounts payable and receivable* – enters transactions, prepares payable/receivable schedule and reconciles with journal or general ledger *Processes payments for accounts payable* – reconciles statements and rectifies errors	Legislation and compliance requirements Industry codes of practice Company policies and procedures Legal systems and procedures Computer and communication systems			

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Unit and element covered in task	Task No.	Observable behaviours in task	Industry requirements	Assessor's comments	Indicate if behaviour observed	Date assessed
		Prepares statements for accounts receivable – produces and checks statement and rectifies errors *Follows up outstanding accounts* – maintains receivable ledger analyses aged accounts receivable reports or follows up on outstanding accounts monitors and reviews credit terms	Security measures Accounting principles			
BSBADM310A 1, 2	**7c**	Prepares general journal entries Posts journals in general ledger Reconciles accounts payable and receivable subsidiary ledger with general ledger Maintains accounting equation Prepares trial balance of the ledger system Identifies and rectifies irregularities and corrects Balances trial balance	Legislation and compliance requirements Company policies and procedures Business communication Security measures and accurate filing Accurate data entry			
BSBCMN308A 1, 2, 3	**7d**	*Maintains financial records* - checks, enters debit and credit transactions *Maintains general ledger* – posts transactions, reconciles debtors and creditors and prepares trial balance *Monitors cash control* – accounts cash flow makes and receives payments collects or follows up outstanding accounts checks payments and dispatches to creditors	Legislation and codes of practice Company policies and procedures Privacy and confidentiality Information technology Audit requirements Data security			

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Unit and element covered in task	Task No.	Observable behaviours in task	Industry requirements	Assessor's comments	Indicate if behaviour observed	Date assessed
BSBCMN316A 1, 2, 3	**8a**	Responds appropriately to customer complaint (or difficult customer) Completes complaint documents with customer Looks in to complaint Discusses findings with customer Decides on resolution Gains customer agreement on resolution Refers complaint if unable to resolve	Legislation and regulations Company policies and procedures Company products, policy terms and conditions Communication skills Customer relation procedures Information privacy			
BSBCMN310A 1 BSBCMN317A 1	**8b**	Clarifies needs and expectations Identifies special needs Provides customer information on options available Explains any limitations to customer Seeks input externally if required	Legislation and regulations Company policies and procedures esp. Customer relations Company products, policy terms and conditions Communication skills			
BSBCMN309A 1, 2, 3 BSBCMN317A 2, 3	**8c**	Applies knowledge of products and services to meet customer needs Discusses characteristics, features and benefits with customer Answers questions Recommends product/service appropriate to customer needs Discusses promotions on product/service Confirms product/service meets needs Assess cost/impact/benefit of promotion activities	Legislation Industry standards Company policies and procedures Business communication skills Customer special needs			

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Unit and element covered in task	Task No.	Observable behaviours in task	Industry requirements	Assessor's comments	Indicate if behaviour observed	Date assessed
BSBCMN310A 2	**8d**	Meets customer needs Maintains customer relationship Delivers prompt service Responds to complaints and special needs	Legislation Legal requirements Organisation's strategic objectives and plans Company policies and procedures Job descriptions			
BSBCMN315A 1, 2 BSBFLM303B 1, 2, 3, 4	**8e**	Responds appropriately to individual differences (diversity) Maintains relationships and works effectively with individual differences Seeks input from others to help customer Consults network to meet customer needs Encourages trust and confidence with customer and others Contributes to a positive outcome	Legislation and Acts Codes of practice Company policies and procedures Code of conduct			
BSBCMN310A 3	**8f**	Monitors product/service delivery Enhancement opportunities identified Monitors service delivery procedures Checks back with customer to ensure satisfaction Gains feedback from customer Modifies or recommends improvements based on feedback and monitoring Reports on monitoring/feedback	Company policies and procedures Job descriptions			

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Unit and element covered in task	Task No.	Observable behaviours in task	Industry requirements	Assessor's comments	Indicate if behaviour observed	Date assessed
BSBCMN319A 1, 2, 3, 4	**9a**	Refer to checklist in Section E	OHS Legislation and regulations Company policies and procedures Legal requirements Duty of care Environment acts and regulations			
BSBCMN319A 5 ***Note that element 5 should only be assessed when required by a workplace***	**9a**	Prepares for isolated travel and contingencies Assesses, responds and monitors causality condition/s Provide reassurance and support for casualty Shelters casualty from elements Documents casualty condition/s Communicates with medical services Administers appropriate medication and treatment Decides on and assists in casualty evacuation	OHS Legislation and regulations Company policies and procedures Legal requirements Duty of care First Aid principles Environment acts and regulations			
BSBCMN319A 6	**9a**	Evaluates incident and plans action Debriefs and evaluates situation to improve future operations Accesses bona fide critical stress facilitators as required Implements and evaluates site management operations Plans for contingencies Reviews plans to improve management principles and procedures	OHS Legislation and regulations Company policies and procedures Legal requirements Duty of care Environment acts and regulations			

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Unit and element covered in task	Task No.	Observable behaviours in task	Industry requirements	Assessor's comments	Indicate if behaviour observed	Date assessed
BSBCMN320A 1, 2	**9b**	Maintenance of resources and supplies Accesses policies, procedures and other documents relating to first aid equipment and resources Ensures availability of first aid resources Obtains and maintains consumables and non-consumables Checks and inspects stock on a regular basis Recycles and cleans equipment where possible Controls waste Maintains records relating to first aid equipment and resources	Legislation and regulations WHS Act Australian standards Company policies and procedures Waste management Environmental acts and regulations Confidentiality Duty of Care			
BSBCMN311A 1, 2, 3, 4	**10**	Accesses policies, procedures and other documents relating to OHS and environmental procedures Understands policy and procedure implementation Assists management in implementing policies and procedures Encourages and supports others in managing safety Seeks feedback to identify improvements Supports and advises on training and needs of team Identifies hazards Assesses and controls risk Provides input to procedures Support management in implementing procedures Supports and encourages continuous improvement Maintains records and reports on issues	Legislation and Acts Legal requirements Company policies and procedures Code of practice Australian Standards Industry standards Risk management			

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Unit and element covered in task	Task No.	Observable behaviours in task	Industry requirements	Assessor's comments	Indicate if behaviour observed	Date assessed
BSBCMN301A 1, 2, 3 BSBCMN307A 1, 2, 3 BSBCMN312A 1, 2, 3	**11**	Accesses policies, procedures and other documents relating to change/innovative practices/and maintenance of business resources Decisions are made based on advantages, negatives, consequences, feedback and consultation Prioritises work Identifies parameters in demonstrating initiative Encourages others to be innovative Model high standards of business practice Influence individuals and groups positively advise on resource requirements monitor equipment/resource usage and maintenance Clarify ideas to improve work practices Advise on innovative work practices Support implementation of new work practices Uses business technology to monitor equipment use Compares usage against budget Seeks and logs maintenance services Consults with team Acquires resources Checks delivery of order for quality and quantity Seeks ways to improve work practices Gains feedback on ideas Advises on innovative work practices	Company policies and procedures Legislation Company strategic objectives Quality work standards Continuous improvement Productivity Budgets Supplier information and manuals Waste management			

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Unit and element covered in task	Task No.	Observable behaviours in task	Industry requirements	Assessor's comments	Indicate if behaviour observed	Date assessed
		Support others in new work practices Encourages and mentors team members on change and new work practices				
BSBADM305A 1, 2, 3, 4	**12**	Follows safe work practices Prepares to create a simple database Creates report formats Creates queries using the database Uses database Enters and checks data Te queries and formulae Generates report/s Names and store database correctly	Legislation Company policies and procedures Workplace documentation Data management Information technology			

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SECTION E

Resources for Practical Tasks

You use this section to access any resources required by the candidate to undertake the practical task/s or scenario/s. They are suggested resources only. You may wish to modify or use other resources for the assessment tasks.

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PRACTICAL TASK 1 Resource

CANDIDATE'S NAME: _____

SIGNATURE: _____

DATE: _____

Message 1 - Request for training

Can you please fill in the details and register a date for training two new staff members.

You will need to do this ASAP as they start next week in their new role.

Sorry for the short notice. Thanks

Caroline

Message 2 - An appraisal to be signed off and forwarded to your Team Manager

15/11/02

"Can you please sign off my training as complete and forward on to the Team Manager at his request."

Betty

Message 3 - An email message from one of the staff reads

6pm, Thursday, November 14

"As you are aware from our meeting last week, we have a new promotion starting next month and all staff need to be trained prior to it's launch. Can you please complete a training schedule including all staff members and put it on my desk by the end of business today."

Greg Jones

Memo to staff regarding issue of and use of a computer or laptop

Issue of a Computer/Laptop:

- Where the use of a company computer/laptop is included in a staff member's employment conditions, a computer/laptop will be issued to that staff member for carrying out business activities.
- A mouse, power pack & carry case for laptops and software appropriate to each staff member's position will also be supplied.
- The computer/laptop and accessories are to be returned upon termination of employment in good and working order.

Use of computer/laptop:

- The computer/laptop is to be used for business purposes only i.e. no personal software installations - downloads, no instant messaging software or usage, no music downloads etc
- All reasonable efforts to maintain the computer/laptop issued including protecting against threats of virus, allowing for software security upgrades, maintaining data integrity, handling with care as fragile and pack away laptops into protective carry case during transportation.
- Laptops are to be place in protective carry case every day at the close of business and placed in a secure area out of sight within the staff members work area.

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PRACTICAL TASK 9 – First Aid Checklist

CANDIDATE'S NAME: _____

SIGNATURE: _____

DATE: _____

Action demonstrated		Satisfactorily demonstrated
Assess the situation	• call ambulance before taking any action • identify and minimise physical hazards according to occupational health and safety requirements and workplace procedures • risks to first aider and others • prompt control of situation	
Manage the incident/response	**DRABCD** • **Danger** – Checks site for risks to ensures safety of site for self, bystanders and casualty • **Response** – checks casualty for response • **Airway** – checks airway • **Breathing** – checks for normal breathing • **Compressions** (CPR) – if required, commences compressions at correct rate • **Defibrillation –** if required, commences defibrillation	
Provide first aid treatment	CPR (cardiopulmonary resuscitation) to be conducted by a trained person. ****Assessor to confirm latest recommended number of compressions required at time of assessment****	
Manage the casualty:		
Minor cuts or abrasions	• wash clean • then swab with antiseptic liquid • dry wound • apply sterile dressing or cover with small adhesive dressing	
Loss of consciousness	• start DRABCD	
Minor burns/scalds	• place under running cold water immediately • cover with sterile dressing. Arrange for medical attention	
Fractures	• preferable to make patient comfortable • wait for ambulance	
Poisoning	• call poison information line and consult a doctor	
Heart attack	• commence CPR (cardiopulmonary resuscitation)	
Seizure	• prevent injury by removing dangerous items, monitor length of the seizure	
Electrocution	• switch off power supply • remove from contact with non conductive object • start DRABCD	

Comments:

_____

_____

_____

ASSESSOR NAME: _____

ASSESSOR SIGNATURE: _____

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SECTION F

Third Party Verification

The preferred approach in gaining third party validation is to take the forms in this section to the candidate's previous employers or referees to gain confirmation of the candidate's skills against the required competencies. This would be done during a conversation or interview with these people.

It may be beneficial to make contact with the employers/referees early in the recognition process to make appointments, particularly if you have to travel some distance to visit them. This may be done on the same day as a practical assessment in the workplace if appropriate.

It is recommended that verification be obtained from one or two referees who can confirm the candidate's industry skills in context over time.

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REFEREE TESTIMONIAL

(Date)

To whom it may concern,

RE: _____skills in/as _____
(insert candidate name) *(insert industry/job title)*

I certify that the above named person has:

worked at _____ for a period of _____ years

regularly undertaken the following activities within the workplace since commencing employment with this organisation:

➔ *Initial those skills/ competencies (below) that the candidate has or can successfully perform in the workplace*

— exercised initiative in the workplace and supported in changed processes
— organised personal priorities and scheduled appointments and meeting for others
— contributed to personal skills development and learning
— organised information and used a knowledge management system
— produced business documents including reporting, workplace records, memos, email, etc
— maintained resources and equipment (including first aid)
— processed and maintained financial records including payroll, general ledger and accounts payable and receivable
— recommended products and services to meet customer needs and expectations
— processed customer complaints with positive outcomes
— maintained workplace safety
— supported management in implementing policies and producing and advised on improvements
— contributed to effective relationships in the workplace
— applied advanced first aid
— produced notes and text from notes, shorthand and audio transcripts
— created and used databases
— created electronic presentations

If you would like any further information or would like to discuss any of the above, I can be contacted on _____.

Yours sincerely

Signature
Print Name and Position

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SECTION G

Assessment Tables

You use these tables as a reference tool to see at a glance which units/elements of competency are within the qualification.

Question numbers refer to those found in **SECTION C** of this kit.

Practical assessment/scenarios numbers refer to those found in **SECTION D** of this kit.

It is important to note that this section is used for validation purposes only. Any mapping should be done after questions and tasks have been selected.

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Elements	Performance Criteria	Questions	Practical Tasks
BSBCMN301A Exercise initiative in a business environment			
1. Model high standards of business practices	1.1 Own work practices are consistent with organisational requirements and with agreed roles and responsibilities	1, 2	Task 11
	1.2 Personal work goals are identified, prioritised and pursued in accordance with organisation's goals and objectives	1, 2	
	1.3 Own work practices and behaviour are amended to reflect performance feedback and promote continuous improvement	1, 2	
	1.4 Practices detrimental to the organisation are identified and communicated within appropriate organisational requirements	1, 2	
2. Influence individuals and groups positively	2.1 Initiative style is consistent with organisational requirements and agreed roles and responsibilities	1, 2	Task 11
	2.2 Opportunities are identified and used to raise awareness and commitment to the goals and values of the organisation	1, 2	
	2.3 Appropriate negotiation skills are used to promote group consensus and a common understanding of organisational requirements	1, 2	
	2.4 Coaching and mentoring assistance is provided to individuals and groups to support the achievement of work priorities	1, 2	
	2.5 Encouragement is provided to others to develop innovative practices and strategies consistent with organisational requirements	1, 2	
	2.6 Regular performance feedback is provided to individuals and groups in accordance with organisational requirements	1, 2	
3. Make informed decisions	3.1 Decision making processes are participative and used to review work of the group and to allocate appropriate responsibilities	3	Task 11
	3.2 Parameters for decisions are clear and options are based on valid and reliable information	3	
	3.3 Decisions are consistent with applicable ethical and regulatory obligations and organisational requirements	3	
	3.4 Feedback is given to clarify the impact of decisions	3	
BSBCMN302A Organise personal work priorities and development			
1. Organise and complete own work schedule	1.1 Work goals and objectives are understood, negotiated and agreed in accordance with organisational requirements	4, 5	Task 3
	1.2 Workload is assessed and prioritised to ensure completion within identified timeframes	4, 5	
	1.3 Factors affecting the achievement of work objectives are identified and incorporated into work plans	4, 5	
	1.4 Business technology is used efficiently and effectively to manage and monitor scheduling and completion of tasks	4, 5	
2. Monitor own work performance	2.1 Personal work performance is accurately monitored and adjusted to ensure maintenance of job quality and customer service	4, 5	Task 3
	2.2 Feedback on performance is actively sought from colleagues and clients and evaluated in the context of individual and group requirements	4, 5	
	2.3 Variations in the quality of service and products are routinely identified and reported in accordance with organisational requirements	4, 5	
3. Develop and maintain own competence level	3.1 Personal knowledge and skills are assessed against competency standards performance descriptions to determine development needs and priorities	6	Task 3
	3.2 Opportunities for improvement are identified and planned in liaison with colleagues	6	
	3.3 Feedback is used to identify and develop ways to improve competence within available opportunities	6	
	3.4 New skills and opportunities to develop them are identified to achieve and maintain continuous learning	6	
	3.5 Records and documents relating to achievements and assessments are stored and maintained in accordance with own requirements	6	

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Elements	Performance Criteria	Questions	Practical Tasks
BSBCMN304A Contribute to personal skill development and learning			
1. Identify own learning needs for skill development	1.1 Personal learning needs and skill gaps are self assessed	7, 8	Task 5
	1.2 Advice on learning needs is provided to relevant personnel	7, 8	
	1.3 Opportunities for undertaking personal skill development activities are identified and planned in liaison with work groups and relevant personnel	7, 8	
2. Undertake personal skill development	2.1 Appropriate opportunities provided by the workplace are identified	7, 8	Task 5
	2.2 Opportunities are identified to use appropriate new skills in workplace activities	7, 8	
	2.3 Coaching / mentoring advice is followed through in work activities	7, 8	
3. Monitor learning effectiveness	3.1 Feedback from individuals or colleagues is used to identify future learning opportunities	9	Task 5
	3.2 Where a final assessment process is carried out, the outcomes are reviewed and further learning needs are identified.	9	
	3.3 Suggestions for improving learning opportunities and assessment processes are provided to appropriate personnel	9	
BSBCMN305A Organise workplace information			
1. Collect and assess information	1.1 Information held by the organisation on products and services is assessed for accuracy and relevance to organisational requirements	10	Task 4
	1.2 Methods of collecting information are reliable and make efficient use of available time and resources	10	
	1.3 Information collected is suitable for analysis, decision making and the development of plans, strategies and options	10	
	1.4 Information collection is participative and uses appropriate interpersonal skills to access relevant data from individuals and team members	10	
	1.5 Appropriate interpersonal skills are used to access relevant information from individuals and teams	10	
2. Organise information	2.1 Information is organised in a format suitable for analysis, interpretation and dissemination in accordance with organisational requirements	10, 11	Task 4
	2.2 Business equipment/technology is used to maintain information in accordance with organisational requirements	10, 11	
	2.3 Information and materials are collated and communicated to relevant designated persons	10, 11	
	2.4 Difficulties organising and accessing information are identified and solved collaboratively with individuals and team members	10, 11	
	2.5 Information is updated and stored in accordance with organisational requirements	10, 11	
3. Review information needs	3.1 Feedback on sufficiency of information is actively sought to ensure relevance of information in accordance with organisational requirements	10, 12	Task 4
	3.2 Contribution of information to decision-making is reviewed and appropriate modifications to collection processes are implemented	10, 12	
	3.3 Future information needs are identified and incorporated in modifications to collection processes	10, 12	
	3.4 Future information needs are documented and incorporated in modifications to reporting processes	10, 12	

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Elements	Performance Criteria	Questions	Practical Tasks
BSBCMN306A Produce business documents			
1. Select and prepare resources	1.1 Appropriate technology and software applications are selected and utilised to produce required business documents	13, 14	Task 1b
	1.2 Organisational requirements for information entry, storage, output and quality of presentation are identified prior to design of documentation	13, 14	
	1.3 Workspace, furniture and equipment are adjusted to suit the ergonomic requirements of the user	13, 14	
2. Design document	2.1 Files and records are identified, opened, generated and amended according to task and organisational requirements	13, 14	Task 1b
	2.2 A range of functions are used to ensure consistency of design and layout	13, 14	
	2.3 Input devices are operated within designated speed and accuracy requirements	13, 14	
3. Produce document	3.1 Document production is completed within designated timelines according to organisational requirements	13, 14	Task 1b
	3.2 Documents produced are checked to ensure they meet task requirements for style and layout	13, 14	
	3.3 Storage of documents is appropriate and applications are exited without damage to or loss of information	13, 14	
	3.4 Manuals, training booklets and/or help-desks are used to overcome basic difficulties with document design and production	13, 14, 15	
BSBCMN307A Maintain business resources			
1. Advise on resource requirements	1.1 Estimates of future and present business resources are calculated in accordance with organisational requirements	16	Task 11
	1.2 Advice is clear, concise and relevant to achievement of organisational requirements	16	
	1.3 Information is provided on the most economical and effective choice of equipment, materials and suppliers	16	
	1.4 Resource shortages and possible impact on operations are identified	16	
2. Monitor equipment/ resource usage and maintenance	2.1 Resource handling is in accordance with established organisational requirements including Occupational Health and Safety requirements	16, 18, 19	Task 11
	2.2 Business technology is used to monitor and identify the effective use of equipment and resources	16, 18, 19	
	2.3 Consultation with individuals and teams is used to facilitate effective decision making on the appropriate allocation of resources	16, 18, 19	
	2.4 Relevant policies regarding resource use are identified and adhered to in the performance of operational tasks	16, 18, 19	
	2.5 Resource usage is routinely monitored and compared with estimate requirements in budget plans	16, 18, 19	
3. Acquire resources	3.1 Acquisition and storage of resources is in accordance with organisational requirements	17	Task 11
	3.2 Acquisition of resources is cost effective and consistent with organisational timelines	17	
	3.3 Resources are acquired within available timelines to meet identified requirements	17	
	3.4 Resource acquisition processes are reviewed to identify improvements in future resource acquisitions	17	
BSBCMN308A Maintain financial records			
1. Maintain daily financial records	1.1 Daily financial records are maintained correctly and in accordance with organisational requirements for accounting purposes	20, 21, 22, 23	Task 7c/d
	1.2 Discrepancies or errors in documentation or transactions are identified and rectified or referred to designated persons in accordance with organisational requirements	20, 21, 22, 23	
	1.3 Credit and debit transactions are accurately and promptly entered into journals in accordance with organisational requirements	20, 21, 22, 23	

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Elements	Performance Criteria	Questions	Practical Tasks
2. Maintain general ledger	2.1 General ledger is maintained in accordance with organisational requirements	20, 21, 22, 23	Task 7c/d
	2.2 Transactions are posted into the general ledger in accordance with organisational reporting requirements	20, 21, 22, 23	
	2.3 Debtors' and creditors' systems are reconciled with general ledger	20, 21, 22, 23	
	2.4 Trial balance is accurately prepared from general ledger in accordance with organisational requirements	20, 21, 22, 23	
3. Monitor cash control	3.1 Cash flow is accurately accounted for in accordance with organisational requirements	20, 21, 22, 23	Task 7c/d
	3.2 Payments are made and received in accordance with organisational requirements	20, 21, 22, 23	
	3.3 Outstanding accounts are collected or followed up within designated timelines	20, 21, 22, 23	
	3.4 Payment documentation is checked for accuracy of information and despatched to creditors within designated timeline	20, 21, 22, 23	
BSBCMN309A Recommend products and services			
1. Develop and maintain knowledge of products and services	1.1 A comprehensive knowledge and understanding of industry products and services is actively and regularly researched from authoritative sources	24, 25	Task 8c
	1.2 Characteristics of products and services are identified and understood using available product and service documentation	24, 25	
	1.3 Information on products and services is accurately documented and maintained in a format consistent with organisational requirements	24, 25	
	1.4 Acquired knowledge is applied to improve quality within personal work areas	24, 25	
2. Recommend products and services	2.1 Recommendations on products and services are in line with organisational requirements	25	Task 8c
	2.2 Recommendations emphasise product and service issues relevant to client needs	25	
	2.3 Evidence in support of recommendations is verifiable and presented in a suitable format	25	
	2.4 Recommendations are structured to identify clear benefits to clients and the organisation	25	
3. Advise on promotional activities	3.1 Advice provided is clear and supported by verifiable evidence and is compatible with organisational requirements	26, 27	Task 8c
	3.2 Promotional documentation and materials are appropriate to presentation of the organisation's products and services	26, 27	
	3.3 Costs of promotional activities conform to budget resources	26, 27	
	3.4 Impact of promotional activities is estimated from verifiable customer feedback sources	26, 27	
	3.5 Benefits of promotional activities are evaluated and incorporated in plans for future promotional activities	26, 27	
BSBCMN310A Deliver and monitor a service to customers			
1. Identify customers' needs	1.1 Customers' needs and expectations are clarified and accurately identified using appropriate interpersonal skills	28, 29, 30	Task 8b
	1.2 Customers' needs are assessed for urgency to determine priorities for service delivery in accordance with organisational requirements	28, 29, 30	
	1.3 Customers are provided with information about available choices for meeting their needs and assisted in the selection of preferred options	28, 29, 30	
	1.4 Limitations in addressing customers' needs are identified and appropriate assistance is sought from designated individuals	28, 29, 30	
2. Deliver a service to customers	2.1 Service is provided promptly to customers to meet identified needs in accordance with organisational requirements	28, 30	Task 8d
	2.2 Appropriate rapport is established and maintained with customers to ensure completion of the delivery of a quality service.	28, 30	
	2.3 Customers' complaints are handled sensitively and courteously in accordance with organisational requirements	28, 30	
	2.4 Customers with special needs or assistance are responded to in accordance with organisational requirements	28, 30	
	2.5 Available opportunities are identified and used to promote and enhance services and products to customers	28, 30	

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Elements	Performance Criteria	Questions	Practical Tasks
3. Monitor and report on service delivery	3.1 Customer satisfaction with service delivery is regularly reviewed using verifiable evidence in accordance with organisational requirements	28, 29, 30	Task 8f
	3.2 Opportunities to enhance the quality of service and products are identified and pursued within organisational requirements	28, 29, 30	
	3.3 Procedural aspects of service delivery are monitored for effectiveness and suitability to customer requirements	28, 29, 30	
	3.4 Customer feedback is regularly sought and used to improve the provision of products and services	28, 29, 30	
	3.5 Decisions to modify products or services incorporate evidence of customer satisfaction and are within organisational requirements	28, 29, 30	
	3.6 Reports are clear, detailed and contain recommendations focused on critical aspects of service delivery	28, 29, 30	
BSBCMN311A Maintain workplace safety			
1. Assist incorporation of Occupational Health and Safety policy and procedures into the work team	1.1 Understanding of basic requirements of Occupational Health and Safety legislation in area of responsibility appropriate for health and safety needs of a small work team are demonstrated	31, 32, 34	Task 10
	1.2 Information on the organisation's Occupational Health and Safety policies, procedures and programs is provided in a readily accessible manner and clearly explained to the work group	31, 32, 34	
	1.3 Information about identifying hazards and the outcomes of risk assessment and control is regularly provided and clearly explained to the work group	31, 32, 34	
2. Support participative arrangements for the management of Occupational Health and Safety	2.1 Organisational consultative procedures are implemented and monitored to facilitate participation of work group in management of work area hazards	31, 32, 34	Task 10
	2.2 Issues raised through consultation are promptly dealt with in accordance with organisational procedures for issue resolution	31, 32, 34	
	2.3 Encouragement and assistance is given to team members to contribute to the management of cupational Health and Safety at the workplace	31, 32, 34	
	2.5 Feedback from individuals and teams is used to identify and implement improvements in the management of Occupational Health and Safety	31, 32, 34	
3. Support the organisation's procedures for providing Occupational Health and Safety training	3.1 Advice is provided on Occupational Health and Safety training needs of individuals and workgroup	33	Task 10
	3.2 Advice is provided on strategies and opportunities for development of workgroup's competencies in relation to Occupational Health and Safety	33	
	3.3 Coaching and mentoring assistance is provided to team members to support the effective development of individual and group competencies in Occupational Health and Safety	33	
4. Participate in identifying hazards and assessing and controlling risks for the work area	4.1 Advice is provided on hazards in work area in line with organisation's Occupational Health and Safety policies and procedures	31, 32, 34	Task 10
	4.2 Support is provided in implementing procedures to control risks using the hierarchy of controls and in accordance with organisational procedures	31,32, 34	
	4.3 Inadequacies in existing risk control measures are identified and reported in accordance with the hierarchy of controls Occupational Health and Safety records of incidents in the work area are accurately completed and maintained in accordance with Occupational Health and Safety legal requirements	31, 32, 34	

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Elements	Performance Criteria	Questions	Practical Tasks
BSBCMN312A Support innovation and change			
1. Clarify ideas to improve work practices	1.1 Advantages, disadvantages and consequences of ideas are identified	35, 36	Task 11
	1.2 Options are considered and discussed with colleagues	35, 36	
	1.3 Feedback is reflected and used to improve ideas	35, 36	
	1.4 Methods of communicating ideas are considered	35, 36	
2. Advise on innovative work practices	2.1 Advice is clear and consistent with organisational requirements	35, 36	Task 11
	2.2 Advice provided is realistic and relevant within context of current work practices and objectives	35, 36	
	2.3 Recommendations are provided on required resources, timelines and roles and responsibilities for successful implementation of change	35, 36	
	2.4 Information about risk factors is used to identify potential constraints	35, 36	
	2.5 Feedback on innovations is obtained from designated individuals and groups	35, 36	
3. Support implementation of new work practices	3.1 Work schedules are adjusted to incorporate necessary modifications to existing work patterns and routines	35, 36, 37	Task 11
	3.2 Business technology is used to manage and provide access to information on progress towards objectives of change	35, 36, 37	
	3.3 Mentoring and coaching is provided to support individuals and groups in the introduction of change	35, 36, 37	
	3.4 Consultation is undertaken with individuals and teams to promote participation in change	35, 36, 37	
	3.5 Advice is provided on the impact of change in a manner accessible to designated personnel	35, 36, 37	
BSBCMN313B Maintain environmental procedures			
1. Maintain workplace procedures	1.1 Convey *workplace procedures and work instructions* for integrated environmental and energy efficiency work practices for own work area to *team* and follow accurately	38, 39, 40	
	1.2 Identify, deal with and report existing and potential environmental and *greenhouse risks* to designated personnel	38, 39, 40	
	1.3 Respond to required changes to workplace practices/procedures promptly and positively	38, 39, 40, 41	
	1.4 Implement contingency plan immediately when unplanned incidents occur	38, 39, 40	
2. Support continuous improvement	2.1 Monitor and record *environmental and energy efficiency performance* for own work area	38, 39, 40	
	2.2 Gather information and *suggest* improvements to support the development of improved work practices	38, 39, 40	
	2.3 Identify *work team environmental and energy efficiency training* needs and seek further training as required	38, 39, 40, 41	
3. Maintain recording procedures	3.1 Store and securely maintain *Environmental and energy efficiency records* accurately and in a form accessible for reporting purposes	39	
	3.2 Identify and maintain internal and external reporting procedures	39	
BSBCMN314A Utilise a knowledge management system			
1. Access and use knowledge management system	1.1 Knowledge management system is accessed to assist with specific tasks in line with system procedures	42	Task 6
	1.2 System is administered in line with procedures	42	

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Elements	Performance Criteria	Questions	Practical Tasks
2. Input to knowledge management system	2.1 Inputs are gathered, analysed and prepared for contribution to the system in line with procedures	42, 43	Task 6
	2.2 Inputs are checked for clarity, accuracy, currency and relevance	42, 43	
	2.3 Inputs are made to system in line with procedures	42, 43	
	2.4 Requirements of the system are analysed and suggestions for improvements are provided to relevant personnel	42, 43	
3. Contribute to monitoring and enhancing knowledge management system	3.1 Feedback about the clarity, accuracy, currency and relevance of the system's output is provided to relevant personnel	44	Task 6
4. Review and improve work practices	4.1 Learning resulting from the use of the system is documented	44	Task 6
	4.2 Work practices are improved as a result of learning from the use of the system	44	
BSBCMN315A Work effectively with diversity			
1. Recognise individual differences and respond appropriately	1.1 Individual differences in colleagues, clients and customers are recognised and respected	45, 46	Task 8e
	1.2 Differences are responded to sensitively	45, 46	
	1.3 Behaviour is consistent with legislative requirements and enterprise guidelines	45, 46	Task 8e
	1.4 Verbal and non-verbal communication accommodates diversity	45, 46	
2. Work effectively with individual differences	2.1 Team objectives are analysed to identify opportunities to use individual differences of self and colleagues	45, 46	Task 8e
	2.2 Colleagues are encouraged to utilise their special qualities, skills or backgrounds to enhance work outcomes	45, 46	
	2.3 Relations with customers and clients demonstrate that diversity is valued by the business	45, 46	
BSBCMN316A Process customer complaints			
1. Respond to complaints	1.1 Customer complaints are processed in accordance with organisational procedures established under company policies, legislation or codes of practice and by using effective communication	47, 48	Task 8a
	1.2 Necessary reports relating to the complaints are obtained, documented and reviewed	47, 48	
	1.3 Decisions are made, taking into account applicable law, company policies and code	47, 48	
	1.4 Resolution of the complaint is negotiated and agreed where possible	47, 48	
	1.5 A register of complaints/disputes is maintained	47, 48	
	1.6 The customer is informed of outcome of the investigation	47, 48	
2. Refer complaints	2.1 Complaints that require referral to other personnel or external bodies are identified	48	Task 8a
	2.2 Referrals are made to appropriate personnel for follow-up in accordance with individual level of responsibility	48	
	2.3 All documents and investigation reports are forwarded	48	
	2.4 Appropriate personnel are followed-up to gain prompt decisions	48	
3. Exercise judgment to resolve customer service issues	3.1 Implications of issues for the customer and for the organisation are identified	47	Task 8a
	3.2 Appropriate options for resolution are analysed, explained and negotiated with the customer	47	
	3.3 Viable options proposed are in accordance with appropriate legislative requirements and enterprise policies	47	
	3.4 Matters for which a solution cannot be negotiated are referred to appropriate personnel\	48	

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Elements	Performance Criteria	Questions	Practical Tasks
BSBCMN317A Meet customer needs and expectations			
1. Identify customer needs and expectations	1.1 Customer preferences, needs and expectations are clarified	49, 50	8b, 8f
	1.2 Special requirements of customers are identified promptly	49, 50	8b, 8f
	1.3 Effective communication appropriate to the relationship and the purpose of the interaction is used	49, 50	8b, 8f
	1.4 External assistance is accessed as required	49, 50	8b, 8f
2. Provide the identified customer needs and expectations	2.1 Knowledge of specified products and services is applied to provide assistance to customers	49	8c
	2.2 Alternative products and services are suggested if necessary	49	8c
	2.3 Features and benefits of relevant products and services are explained to customers	49	8c
	2.4 Special promotions for products and services are suggested to customers according to organisational policies	49	8c
	2.5 Confirmation is sought from customers that needs and, where practical, expectations have been satisfied	49	8f
3. Develop knowledge for a specific range of products and services	3.1 Features and characteristics of a specified range of products and services are identified and described accurately	49	8c
	3.2 Knowledge of a specified range of products and services, including comparisons between specified products and services, is developed and maintained	49	8c
	3.3 Organisation manuals, labels and instructions are read, interpreted and stored according to organisational policies, procedures and standards	49	8c
	3.4 Availability of products and services is determined according to organisation and/or supplier information	51	8c
BSBCMN318A Write simple documents			
1. Plan document	1.1 Audience and purpose is determined	52	Task 1b
	1.2 Format and structure for the document is determined	52	
	1.3 Key points for inclusion are established	52	
	1.4 Organisational requirements are identified	52	
	1.5 Method of communication is established	52	
	1.6 Means of communication is established	52	
2. Draft document	2.1 Draft document is developed to communicate key points	52	Task 1b
	2.2 Any required additional information is obtained and included	52	
3. Review document	3.1 Draft is checked for suitability of tone for audience, purpose, format and communication style	53	Task 1b
	3.2 Draft is checked for readability, grammar, spelling and sentence and paragraph construction	53	
	3.3 Draft is checked for sequencing and structure	53	
	3.4 Draft is checked to ensure it meets organisational requirements	53	
	3.5 Draft is proofread, where appropriate, by supervisor or other colleague	53	
4. Write final document	4.1 Necessary changes are made and checked	53	Task 1b
	4.2 Document is sent to intended recipient	53	
	4.3 Copy of document is filed in accordance with organisational policies and procedures	53	

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Elements	Performance Criteria	Questions	Practical Tasks
BSBCMN319A Apply advanced first aid			
1. Assess the situation	1.1 Physical hazards are identified and minimised according to OHS requirements and workplace procedures	54, 55, 56, 57	Task 9a
	1.2 Risks to first aider and others are assessed and an appropriate response determined to ensure prompt control of situation	54, 55, 56, 57	
	1.3 Need for emergency services and/or medical assistance is ascertained and prioritised and triage undertaken where required	54, 55, 56, 57	
2. Manage the casualty(s)	2.1 Agreement for management of the casualty's injury/illness is sought from person(s), as applicable	54, 55, 56, 57	Task 9a
	2.2 Welfare procedure is determined and implemented according to casualty's needs	54, 55, 56, 57	
	2.3 Effects of injury are controlled and appropriate first aid management is determined and applied to meet the needs of the casualty and the situation	54, 55, 56, 57	
	2.4 Medication is administered according to relevant legislation and manufacturer's/supplier's instructions and subject to casualty's regime	54, 55, 56, 57	
	2.5 Casualty's condition is monitored and responded to in a timely manner in accordance with effective first aid principles	54, 55, 56, 57	
	2.6 Life support equipment is correctly operated where appropriate according to relevant legislation and manufacturer's/supplier's instructions	54, 55, 56, 57	
	2.7 Management is finalised according to casualty's needs and first aid principles	54, 55, 56, 57	
3. Coordinate first aid activities until arrival of medical assistance	3.1 Available resources required are identified and communication links with appropriate personnel, emergency management services and medical assistance are established as appropriate	54, 55, 56, 57	Task 9a
	3.2 Correct amount of resources are deployed to appropriate locations in an effective manner to ensure timely arrival of required resources	54, 55, 56, 57	
	3.3 The provision of resources is documented and modifications recommended	54, 55, 56, 57	
	3.4 The management of the casualty is monitored in accordance with first aid principles and workplace procedures	54, 55, 56, 57	
	3.5 Evacuation of the casualty is coordinated according to worksite evacuation procedures	54, 55, 56, 57	
	3.6 Support services are arranged for personnel involved in the incident in accordance with workplace principles and procedures	54, 55, 56, 57	
4. Communicate essential incident details	4.1 Communication is maintained with relevant personnel using appropriate media and equipment	55, 56, 57	Task 9a
	4.2 First aid information is communicated with other providers/carers as appropriate to meet their needs and in accordance with workplace procedures	55, 56, 57	
	4.3 Information is calmly provided to reassure casualty, adopting a communication style to match the casualty's level of consciousness	55, 56, 57	
5. Manage casualty in a remote and/or isolated area ****Note that element 5 should only be assessed when required by a workplace****	5.1 Preparation for isolated travel and work is undertaken, accounting for expected contingencies	54, 55, 56, 57	Task 9a
	5.2 Casualty's condition is assessed and appropriate response is determined in order to minimise hazards and determine need for medical assistance	54, 55, 56, 57	
	5.3 Casualty's condition is monitored and responded to in accordance with effective first fid principles	54, 55, 56, 57	
	5.4 Reassurance and support are provided to the casualty during the wait for medical assistance	54, 55, 56, 57	
	5.5 Shelter from elements is undertaken in accordance with environmental conditions	54, 55, 56, 57	
	5.6 Documentation of condition of the casualty is made over time to assist in ongoing management	54, 55, 56, 57	
	5.7 Communication links to medical services are established to ensure prompt control action is undertaken	54, 55, 56, 57	

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Elements	Performance Criteria	Questions	Practical Tasks
	5.8 Administration of medication is undertaken under medical instruction, using relevant communication equipment	54, 55, 56, 57	
	5.9 Decision whether to transport the casualty to medical assistance or wait is made by evaluating environmental and casualty's condition	54, 55, 56, 57	
	5.10 Assistance in the evacuation of the casualty by emergency services is provided as required	54, 55, 56, 57	
6. Evaluate the incident	6.1 Management of the incident is evaluated and, where required, an action plan is developed in consultation with relevant parties	54, 55, 56, 57	Task 9a
	6.2 Participation in debriefing and evaluation occurs either by self or others or both in order to improve future operations and address individuals' needs	54, 55, 56, 57	
	6.3 Access is provided to bona fide critical stress facilitators where required or requested	54, 55, 56, 57	
	6.4 Site management and procedures are implemented and evaluated in accordance with risk assessment	54, 55, 56, 57	
	6.5 Contingency planning is formulated and reviewed to identify and select alternative management principles and procedures	54, 55, 56, 57	
BSBCMN320A Maintain first aid equipment and resources			
1. Maintain resources	1.1 Availability of adequate and relevant first aid resources is ensured and secured in accordance with workplace procedures	58, 59	Task 9b
	1.2 Consumables and non-consumables required by the workplace are identified and obtained to maintain adequate readiness of supplies	58, 59	
	1.3 Stock is checked and regular inspection of equipment is carried out for condition and currency	58, 59	
	1.4 Equipment is recovered, cleaned and waste is disposed of safely according to requirements set out in relevant legislation and site procedures	58, 59	
	1.5 Resources are maintained in operational readiness in accordance with workplace procedures	58, 59	
	1.6 Resources are stored in the correct manner to ensure their future operation and serviceability	58, 59	
2. Record and manage records	2.1 Relevant forms are completed as required according to legislation and site procedures	58, 60	Task 9b
	2.2 Forms are stored in accordance with legislative and site procedures	58, 60	
	2.3 Relevant forms are sent to appropriate bodies and appropriate filing of these records and security of such records is undertaken according to workplace and legislative requirements and codes of practice	58, 60	
	2.4 Confidentiality of records and information is maintained in accordance with privacy principles and statutory and/or organisational policies and procedures	58, 60	
BSBFLM303B Contribute to effective workplace relationships			
1. Seek, receive and communicate information and ideas	1.1 Information associated with the achievement of work responsibilities is collected from appropriate sources	61, 62, 63	Task 8e
	1.2 Ideas and information are communicated in a manner which is appropriate and sensitive to the cultural and social diversity of the audience and any special needs	61, 62, 63	
	1.3 Contributions from internal and external sources are sought and valued in developing and refining new ideas and approaches within organisational processes	61, 62, 63	
	1.4 Consultation process allows employees to contribute to issues related to their work, and the outcomes of consultation are promptly made known to the work team	61, 62, 63	
	1.5 Issues raised are dealt with and resolved promptly or referred to relevant personnel	61, 62, 63	

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Elements	Performance Criteria	Questions	Practical Tasks
2. Encourage trust and confidence	2.1 People are treated with integrity, respect and empathy	61, 62, 63	Task 8e
	2.2 Effective relationships are encouraged within the framework of the organisation's social, ethical and business standards	61, 62, 63	
	2.3 Trust and confidence of colleagues, customers and suppliers is gained and maintained through competent performance	61, 62, 63	
	2.4 Interpersonal styles and methods are adjusted to the organisation's social and cultural environment	61, 62, 63	
3. Identify and use networks and relationships	3.1 Workplace networks are identified and used to help build relationships	61, 62, 63	Task 8e
	3.2 Value of networks and other work relationships is recognised in providing benefits for the team and the organisation	61, 62, 63	
4. Contribute to positive outcomes	4.1 Difficulties are identified and action is taken within own level of responsibility to rectify the situation according to organisational and legal requirements	61, 62, 63	Task 8e
	4.2 Colleagues are supported in resolving work difficulties	61, 62, 63	
	4.3 Workplace outcomes are regularly reviewed and improved in consultation with relevant personnel	61, 62, 63	
	4.4 Poor work performance is identified and action is taken within own level of responsibility according to organisational policies	61, 62, 63	
	4.5 Conflict is dealt with constructively within the organisation's established processes	61, 62, 63	
BSBADM301A Produce text from shorthand notes			
1. Take dictation using shorthand	1.1 Organisational and task requirements relating to style, presentation and storage of documents are identified prior to commencing the task	A1, A2, A3	Task 1a
	1.2 The purpose and requirements of the text are clarified with the author	A1, A2, A3	
	1.3 Shorthand notes are recorded from a dictation source at a minimum speed of 60 words per minute	A1, A2, A3	
	1.4 Meaning and spelling of unusual names or terms are clarified to ensure accuracy of the notes	A1, A2, A3	
	1.5 Shorthand notes are self-checked for accuracy	A1, A2, A3	
2. Transcribe shorthand notes	2.1 Text is produced from shorthand notes to the required degree of accuracy and reflects the intended meaning of the author	A1, A2, A3	Task 1a
	2.2 Text is produced within designated timelines	A1, A2, A3	
3. Edit and revise text	3.1 Final text is self-checked for accuracy	A1, A3	Task 1a
	3.2 Text is revised, formatted, printed, named and stored in accordance with organisational and task requirements	A1, A3	
BSBADM302A Produce texts from notes			
1. Take notes	1.1 Organisational requirements relating to style, presentation and storage of documents are identified prior to commencing the task	A1, A2, A3	Task 1a
	1.2 The purpose and requirements of text are clarified with the author	A1, A2, A3	
	1.3 Notes are recorded with the required degree of accuracy	A1, A2, A3	
	1.4 Meaning and spelling of names or technical terms are clarified to ensure accuracy of the notes	A1, A2, A3	
	1.5 Notes are self-checked for accuracy	A1, A2, A3	
2. Transcribe notes	2.1 Text is produced from notes to the required degree of accuracy and reflects the intended meaning of the author	A1, A2, A3	Task 1a
	2.2 Text is produced within designated timelines	A1, A2, A3	

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Elements	Performance Criteria	Questions	Practical Tasks
3. Edit and revise text	3.1 Final text is self-checked for accuracy, and grammar and syntax are appropriate for the intended purpose and audience of the text	A1, A2, A3	Task 1a
	3.2 Text is revised, formatted, named, stored and printed in accordance with organisational and task requirements	A1, A2, A3	
BSBADM303A Produce texts from audio transcription			
1. Prepare for audio transcription	1.1 Organisational requirements relating to style, presentation and storage of texts are identified prior to commencing the task	A1, A2, A3	Task 1a
	1.2 The purpose and requirements of the text are clarified with the author	A1, A2, A3	
2. Transcribe audiotape	2.1 Text is produced from transcription with the required accuracy	A1, A2, A3	Task 1a
	2.2 Audio transcription reflects the intended meaning of the author/s	A1, A2, A3	
	2.3 The meaning of unclear speech is predicted from the context and / or clarified with the author/s	A1, A2, A3	
	2.4 Meaning and spelling of names or technical terms are clarified to ensure accuracy of the text	A1, A2, A3	
	2.5 Text is produced within designated timelines	A1, A2, A3	
	2.6 Transcription is self-checked for accuracy	A1, A2, A3	
3. Edit and revise text	3.1 Final text is self-checked for accuracy, and grammar and syntax are appropriate for the intended purpose and audience of the text	A1, A2, A3	Task 1a
	3.2 Text is revised, formatted, named, stored and printed in accordance with organisational and task requirements	A1, A2, A3	
BSBADM304A Design and develop text documents			
1. Use safe work practices	1.1 Workspace, furniture and equipment are adjusted to suit the ergonomic requirements of the user	A4	Task 1a
	1.2 Work organisation meets organisational and statutory requirements for computer operation	A4	
	1.3 Energy and resource conservation techniques are used to minimise wastage in accordance with organisational and statutory requirements	A4	
2. Establish parameters for text document design and structure	2.1 Organisational requirements for text-based business documents are identified to ensure consistency of style and image	A5	Task 1a
	2.2 Task requirements for the design of text-based business documents are determined to meet organisational purposes	A5	
3. Design text documents	3.1 Text document structure and layout are designed to suit the purpose, audience and information requirements of the task	A5	Task 1a
	3.2 Text document is designed to enhance readability and appearance and meet organisational and task requirements for style and layout	A5	
	3.3 Style sheets and automatic functions are used to ensure consistency of design and layout	A5	
4. Produce text documents	4.1 Advanced software functions are used to enable efficient production of text documents	A5, A6	Task 1a
	4.2 Text and other data are entered or imported, and edited to meet required specifications	A5, A6	
	4.3 Text documents are previewed, adjusted and printed in accordance with organisational and task requirements	A5, A6	
	4.4 Text documents are named and stored, in accordance with organisational requirements and the application exited without information loss/damage	A5, A6	
	4.5 Text documents are prepared within designated timelines and organisational requirements for speed and accuracy	A5, A6	
	4.6 Manuals, user documentation and on-line help are used to overcome problems with document design and production	A5, A6	

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Elements	Performance Criteria	Questions	Practical Tasks
BSBADM305A Create and use databases			
1. Use safe work practices	1.1 Workspace, furniture and equipment are adjusted to suit the ergonomic requirements of the user	A7	Task 12
	1.2 Work organisation meets organisational and occupational health and safety requirements for computer operation	A7	
	1.3 Energy and resource conservation techniques are used to minimise wastage in accordance with organisational and statutory requirements	A7	
2. Create simple databases	2.1 Organisational requirements in relation to data entry, storage, output and presentation requirements are identified	A8	Task 12
	2.2 Database use, output, reporting and presentation requirements are determined in accordance with organisational policy and procedures	A8	
	2.3 Database utilises software functions and simple formulae to meet identified requirements	A8	
	2.4 Data table and form layout enable efficient data input and display	A8	
	2.5 Database reports are formatted in accordance with organisational style and presentation requirements	A8	
3. Create simple database queries	3.1 Information output, database tables to be used and report layout are determined to meet task requirements	A8	Task 12
	3.2 Data groupings, search and sort criteria are determined to meet task requirements	A8	
	3.3 Queries are run and the results checked to ensure they provide the required data	A8	
4. Use simple databases	4.1 Data is entered, checked and amended in accordance with organisational and task requirements	A8	Task 12
	4.2 Data input meets designated timelines and organisational requirements for speed and accuracy	A8	
	4.3 Queries and formulae are tested to confirm output meets task requirements	A8	
	4.4 Manuals, user documentation and on-line help are used to overcome problems with database design and production	A8	
	4.5 Database reports and/or forms are previewed, adjusted and printed in accordance with organisational and task requirements	A8	
	4.6 Databases are named and stored, in accordance with organisational requirements and the application exited without data loss/damage	A8	
BSBADM306A Create electronic presentations			
1. Use safe work practices	1.1 Workspace, furniture and equipment are adjusted to suit the ergonomic requirements of the user	A7	Task 4
	1.2 Work organisation meets organisational and statutory requirements for computer operation	A7	
	1.3 Energy and resource conservation techniques are used to minimise wastage in accordance with organisational and statutory requirements	A7	
2. Prepare presentation	2.1 The purpose, audience and mode of presentation are determined in consultation with the content author / presenter	A9	Task 4
	2.2 Presentation requirements in terms of supporting documents, transparencies and equipment are identified	A9	
	2.3 Slide, notes and handout masters are designed to incorporate organisational and task requirements in relation to image and preferred style/s	A9	
	2.4 Software functions are utilised for consistency of design and layout to meet identified presentation requirements	A9	
	2.5 Presentation features are balanced for visual impact and emphasis	A9	
	2.6 Presentations are prepared within designated timelines	A9	

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Elements	Performance Criteria	Questions	Practical Tasks
3. Produce presentation	3.1 Advanced software features are used to streamline and customise the presentation for different audiences	A9, A10	Task 4
	3.2 Manuals, user documentation and on-line help are used to overcome problems with design and production	A9, A10	
	3.3 Presentation is checked for spelling, consistency and style in accordance with task requirements	A9, A10	
	3.4 Presentation is rehearsed to adjust pace and timing in accordance with task requirements	A9, A10	
	3.5 Presentation materials are printed in accordance with presenter / audience requirements	A9, A10	
	3.6 Presentation is stored, in accordance with organisational requirements and the application exited without information loss/damage	A9, A10	
BSBADM307A Organise schedules			
1. Establish schedule requirements	1.1 Organisational requirements and protocols for diaries and staff planning tools are identified	A11, A12	Task 2
	1.2 Organisational procedures for different types of appointments are identified	A11, A12	
	1.3 Personal requirements for diary / schedule items are determined for individual personnel	A11, A12	
	1.4 Appointment priorities are established and clarified in discussion with individual personnel	A11, A12	
2. Manage schedules	2.1 Recurring appointments and deadlines are identified and scheduled in accordance with individual and organisational requirements	A11, A12	Task 2
	2.2 Availability of attendees is established and new appointments are scheduled in accordance with required timelines and diary commitments	A11, A12	
	2.3 Alternative arrangements are negotiated and confirmed when established appointments are changed	A11, A12	
	2.4 Appointments are recorded and schedules managed in accordance with organisational policy and procedures	A11, A12	
BSBADM308A Process payroll			
1. Record payroll data	1.1 Payroll data is checked and discrepancies clarified with designated person/s	A13, A14	Task 7a
	1.2 Employee pay period details, deductions and allowances are entered in payroll system in accordance with source data	A13, A14	
	1.3 Payment due to individual employees is calculated to reflect standard pay and variations in accordance with employee source data	A13, A14, A15	
2. Prepare payroll	2.1 Payroll is prepared within designated timelines in accordance with organisational policy and procedures	A13, A14	Task 7a
	2.2 Total wages for pay period are reconciled, and irregularities checked and corrected, or referred to designated person/s for resolution	A13, A14, A15	
	2.3 Arrangements for payment are made in accordance with organisational and individual requirements	A13, A14	
	2.4 Authorisation of payroll and individual pay advice is obtained in accordance with organisational requirements	A13, A14	
	2.5 Payroll records are produced, checked and stored in accordance with organisational policy and security procedures	A13, A14	
	2.6 Security procedures for processing payroll and maintaining payroll records are followed	A13, A14	
3. Handle payroll enquiries	3.1 Payroll enquiries are responded to in accordance with organisational and legislative requirements	A13, A14. A15	Task 7a
	3.2 Information is provided in accordance with organisational and legislative requirements	A13, A14, A15	
	3.3 Enquiries outside area of responsibility / knowledge are referred to designated person/s for resolution	A13, A14, A15	
	3.4 Additional information or follow-up action is completed within designated timelines in accordance with organisational policy and procedures	A13, A14, A15	

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Elements	Performance Criteria	Questions	Practical Tasks
BSBADM309A Process accounts payable and receivable			
1. Maintain financial journal systems	1. 1 Source documents are checked for accuracy and authorisation.	A16, A17	Task 7b
	1.2 Errors and discrepancies in source documents are referred for resolution in accordance with organisational policy and procedures	A16, A17	
	1.3 Transactions are entered into the cash and credit journal system in accordance with organisational policy and procedures and accounting requirements	A16, A17	
	1.4 Credit journals are totalled in accordance with organisational policy and procedures	A16, A17	
2. Prepare bank reconciliations	2.1 Cash journals are checked against bank statements to identify differences	A16, A17	Task 7b
	2.2 Cash journals are updated with relevant data from bank statement	A16, A17	
	2.3 Discrepancies are identified and referred to the appropriate staff member/agency	A16, A17	
	2.4 Cash journals are totalled in accordance with organisational policy and procedures	A16, A17	
	2.5 Regular reconciliation reports are prepared within designated timelines	A16, A17	
3. Maintain accounts payable and accounts receivable systems	3.1 Transactions are entered into individual accounts payable and accounts receivable in accordance with organisational policy and procedures and accounting requirements	A16, A17	Task 7b
	3.2 Schedules of accounts payable and accounts receivable are prepared for reconciliation purposes in accordance with organisational requirements	A16, A17	
	3.3 Schedules of accounts payable and accounts receivable are reconciled with journal data or general ledger in accordance with organisational requirements	A16, A17	
4. Process payments for accounts payable	4.1 Accounts payable statements are reconciled with accounting records in accordance with organisational policy and procedures	A16, A17	Task 7b
	4.2 Payment documentation is checked for accuracy of information and discrepancies and errors rectified in accordance with organisational requirements	A16, A17	
5. Prepare statements for accounts receivable	5.1 Accounts receivable statements are produced and checked for accuracy of content in accordance with organisational policy and procedures	A16, A18	Task 7b
	5.2 Discrepancies are rectified and statements despatched within designated timelines	A16, A18	
6. Follow up outstanding accounts	6.1 Accounts receivable ledger system is maintained in accordance with organisational requirements to reflect the current credit situation	A18, A19, A20	Task 7b
	6.2 Aged analysis of accounts receivable is conducted to identify outstanding accounts and determine collection procedures in accordance with organisational requirements	A18, A19, A20	
	6.3 Outstanding accounts are reported or followed up in accordance with organisational policy and procedures	A18, A19, A20	
	6.4 Credit terms are monitored and reviewed in accordance with credit policy and procedures	A18, A19, A20	

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Elements	Performance Criteria	Questions	Practical Tasks
BSBADM310A Maintain a general ledger			
1. Process journal entries	1.1 General journal entries are prepared in accordance with accounting requirements	A21, A22, A23	Task 7e
	1.2 Journals are posted into general ledger system in accordance with organisational policy and procedures and accounting standards	A21, A22, A23	
	1.3 Accounts payable and accounts receivable subsidiary ledger systems are reconciled with general ledger	A21, A22, A23	
	1.4 Processing maintains the accounting equation and is completed within designated timelines	A21, A22, A23	
2. Prepare a trial balance	2.1 Trial balance of the general ledger system is prepared in accordance with organisational requirements and accounting standards	A23, A24	Task 7e
	2.2 Where trial balance does not balance, irregularities are identified and rectified or referred for resolution in accordance with organisational policy and procedures	A23, A24	

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