



The National Finance Institute

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RECOGNITION OF PRIOR LEARNING (RPL)

What is RPL

The National Finance Institute (NFI) recognises the skills and knowledge gained through work experience and/or past study. Trainees with diverse backgrounds, sufficient experience, expertise and verifiable evidence may have the necessary skills and knowledge to apply for RPL against the required competencies. Applicants for RPL must provide evidence that demonstrates competency in each unit of competency for the desired qualification.

Which Qualification

Please tick below the qualification you are seeking to attain:

- ☐ **BSB30415 Certificate III in Business Administration - full qualification**
- ☐ **Selected units only from within the BSB30415 range of competencies, as highlighted within my submission**

RPL Procedure

Your submission should include the following items.

Once assembled, please tick below to confirm you have included these items.

- ☐ Print the attached **Competency Statement/Checklist** and have it completed and signed off by a peer or superior (can be a current contact or prior contact, if applicable)
- ☐ Provide a **detailed CV** demonstrating experience in the industry. This CV must be verified (ie. signed) by a peer or superior. You should also highlight any relevant educational qualifications you have achieved or courses you have completed.
- ☐ Provide a **detailed CV** for the peer or superior who is signing off this RPL application, to verify their qualification to sign off on your RPL application. This document must also be signed by the peer.
- ☐ Include a **Portfolio** containing evidence of work history, training, skills and knowledge which will be assessed against the competencies as outlined in the Checklist. Depending on the style of your CV, this portfolio may form a part of your CV. Evidence may include other course certificates/qualifications (eg. a Training Log showing relevant courses, training, etc.), accreditations, marketing material, personal references, subscriptions, etc.
- ☐ To substantiate your document creation skills, please include a sample of a **business document** that you have created yourself (your CV will suffice if you created this)
- ☐ An **Evidence Checklist** - please complete the Evidence Checklist within, detailing (in your own words) what skills and knowledge you consider that you hold in order to satisfy each of the units of competence.
- ☐ Please complete the **payment form** provided on page 3.

If you are seeking a mixture of RPL, Credit Transfer and Study, please also complete our Unit Chooser form.

By submission trainees agree to The National Finance Institute's terms and conditions available at www.financeinstitute.com.au.

The Assessment Process

The documentation submitted by the trainee to NFI will be assessed against each unit of competency applied for. The evidence submitted will be assessed using the following criteria:

- Is the applicant's experience and study relevant to the qualification?
- Is the applicant's knowledge and skill current?
- Has the applicant's CV been verified as true and correct?
- Are the skills and the knowledge level held by the applicant appropriate to the level of competency for which the applicant is applying?
- A phone interview may also form part of the assessment process.

The NFI assessor will then make one of three decisions:

- Accept the application and grant recognition
- Request further information because the assessor was unable to make a decision on the evidence provided
- Deny the application and recommend that further assessment or training is undertaken to achieve specific unit/s of competence. The applicant will then be advised which subjects or assessments, if any, are required to be completed. See below for how this would affect any fees paid.

What Will I Receive

The assessment decision will be made within 2 to 3 weeks of submission or sooner if seeking recognition for a small number of units. Documentation received by NFI will not be returned to the applicant as it is required to be retained for audit purposes. If the applicant is granted RPL for their chosen qualification they will receive by mail an original certificate and the transcript of competencies that form the qualification. If granted RPL for individual unit/s, a Statement of Attainment will be issued.

How to Submit your Application

Applicants can post or scan/email to NFI as below. Applications received by email will be assessed more quickly than those received by post. Emailed submissions should contain a zipped file if the submission contains more than one file. Please try and limit total attachment size to less than 10Mb.

Post: **RPL Coordinator**
The National Finance Institute
P O Box 1354, Capalaba Business Centre Qld 4157

Scan: **enquiries@financeinstitute.com.au**

Fee / Payment information

Overleaf you will find your payment options. If RPL is not granted for the qualification, the cost of studying individual units from the qualification will be to the maximum fee payable for the full course fee. RPL may be comprised of RPL and proof of prior study ie. Credit Transfer (CT). There is no fee for review of proof of prior study for Credit Transfer purposes, provided the units covered are able to be clearly matched.

Examples:

RPL fee paid of \$995, then:

Applicant 1 – RPL approved for full qualification by RPL/CT = no further payment required

Applicant 2 – RPL approved for 10 out of 13 units = 3 units require studying at \$139 per online unit

Applicant 3 – RPL approved for only 3 out of 13 units = 10 units require studying – as full online course study fee is \$1445, less the \$995 already paid, balance for studying 10 units online is just \$450

For an applicant seeking RPL for one or more individual units the fee is the cost of the online unit ie. \$139 plus \$120 per unit to a maximum fee of \$995. Any promotional discounts are not applicable for Credit Transfer, RPL or study of one unit at a time.

The attached Competency Checklist must be completed. The Checklist is verification by a third party that you are proficient in all areas of the selected. As outlined on page one, the third party is required to submit a signed CV to verify their qualification to make the judgement attested to.

TRAINEE'S DETAILS

First Name: _____

Gender: ☐ Male ☐ Female

Middle Name (if applicable): _____

Date of birth: _____

Surname: _____

Address: _____

Contact details: Phone: _____ Mobile: _____

Email: _____

Additional information required below for education department purposes:

Country of birth: _____ City of birth: _____

Australian citizen: ☐ Yes ☐ No . If No, what is your country of citizenship: _____Current employment status: ☐ Full time ☐ Part time ☐ Self-employed ☐ Not working/made redundantLanguage spoken at home: _____ Proficiency in spoken English: ☐ Very well ☐ Well ☐ Not well

What year did you finish high school? _____

Highest level of education completed: ☐ Bachelor ☐ Diploma ☐ Certificate ☐ Year 12 ☐ Other _____Invoice/receipt to be as follows: ☐ Applicant name as above OR: _____

(if invoice is not to be in the applicant's name, please detail the company/business name and address for the invoice/receipt)

What is your USI? _____

If you don't have a USI (Unique Student Identifier) please go to the link below to create it. USIs are essential.

www.usi.gov.au**PAYMENT METHOD**

Payment is required ahead of NFI's assessor commencing the review of the submission. If choosing Direct Deposit, please make payment immediately before or immediately after sending your RPL submission. Payment is required irrespective of outcome. Where the outcome is a part non-approval, payment can be used in full towards course study. Once the RPL review has begun, refunds are not possible based on change of mind.

☐ **PayPal** - please request a PayPal link for funds payment be emailed to you☐ **Cheque** - Payable to The National Finance Institute, P.O. Box 1354, Capalaba BC Qld 4157☐ **Direct Deposit** - The National Finance Institute, BSB 114 879, Account 003 139 833☐ **Credit Card:** _____ **CCV:** _____**Expiry date:** _____ **Name on Card:** _____**Total Amount Authorised : \$** _____ ☐ \$995 if applying for full qualification☐ \$139 + \$120 for single unit by RPL☐ \$139 + \$120 per unit, for _____ individual units by RPL

Signature: Date:

COMPETENCY STATEMENT / CHECKLIST
FOR RECOGNITION OF PRIOR LEARNING

To be completed and signed by a superior or peer of the applicant.

*The person making this statement must be suitably qualified to answer the questions (CV required as evidence).
The person making this statement must ensure that their responses are true and accurate and that they may be called upon to provide evidence if required in a court of law.*

Details of Person Declaring (ie. the Applicant's peer / superior):

Name: _____

Company and Position (if applicable): _____

Address: _____

Contact details: Phone: _____ Mobile: _____

Email: _____

Signature: _____ Date: _____

A signed declarer's CV is attached: ☐ Yes ☐ No

BSB30415 Certificate III in Business Administration

Full qualification = 2 Core Units + 11 Elective Units

It is certified that the applicant has the following skills and knowledge and can demonstrate the following competencies.

Core Units**BSBITU307 DEVELOP KEYBOARDING SPEED AND ACCURACY**

Element	Performance criteria	Please tick
1 Use safe work practices	1.1 Adjust workspace, furniture and equipment to suit ergonomic requirements	<input type="checkbox"/> Yes
	1.2 Ensure work meets organisational and work health and safety (WHS) requirements for computer operation	<input type="checkbox"/> No <input type="checkbox"/> Unsure
2 Identify and develop keyboard skills	2.1 Identify and apply keyboard functions for both alpha and numeric strokes	<input type="checkbox"/> Yes
	2.2 Apply touch-typing technique to complete tasks	<input type="checkbox"/> No
	2.3 Develop speed and accuracy in accordance with workplace requirements for level of responsibility	<input type="checkbox"/> Unsure
3 Check accuracy	3.1 Proofread document carefully to identify errors	<input type="checkbox"/> Yes
	3.2 Amend document, correct errors and complete a final accuracy check	<input type="checkbox"/> No <input type="checkbox"/> Unsure

BSBWHS201 CONTRIBUTE TO HEALTH AND SAFETY OF SELF AND OTHERS

Element	Performance criteria	Please tick
1 Work safely	1.1 Follow provided safety procedures and instructions when working	<input type="checkbox"/> Yes
	1.2 Carry out pre start systems and equipment checks according to workplace procedures	<input type="checkbox"/> No
	1.3 Follow workplace procedures for responding to emergency incidents	<input type="checkbox"/> Unsure
2 Implement work safety requirements	2.1 Identify designated persons to whom queries and concerns about safety in the workplace should be directed	<input type="checkbox"/> Yes
	2.2 Identify existing and potential hazards in the workplace, report them to designated persons and record them according to workplace procedures	<input type="checkbox"/> No
	2.3 Identify and implement WHS procedures and work instructions	<input type="checkbox"/> Unsure
	2.4 Identify and report emergency incidents and injuries to designated persons according to workplace procedures	
	2.5 Identify WHS duty holders and their duties for own work area	
3 Participate in WHS consultative processes	3.1 Contribute to workplace meetings, inspections and other WHS consultative activities	<input type="checkbox"/> Yes
	3.2 Raise WHS issues with designated persons according to organisational procedures	<input type="checkbox"/> No
	3.3 Take actions to eliminate workplace hazards and reduce risks	<input type="checkbox"/> Unsure

Elective Units Group A

BSBADM307 ORGANISE SCHEDULES

Element	Performance criteria	Please tick
1 Establish schedule requirements	1.1 Identify organisational requirements and protocols for diaries and staff planning tools	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Identify organisational procedures for different types of appointments	
	1.3 Determine personal requirements for diary and schedule items for individual personnel	
	1.4 Establish appointment priorities and clarify in discussion with individual personnel	
2 Manage schedules	2.1 Identify recurring appointments and deadlines, and schedule these in accordance with individual and organisational requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Establish availability of attendees, and schedule new appointments in accordance with required timelines and diary commitments	
	2.3 Negotiate alternative arrangements and confirm when established appointments are changed	
	2.4 Record appointments and manage schedules in accordance with organisational policy and procedures	

BSBFIA302 PROCESS PAYROLL

Element	Performance criteria	Please tick
1 Record payroll data	1.1 Check payroll data and clarify discrepancies with designated persons	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Enter employee pay period details and any deductions and allowances in payroll system in accordance with source documents	
	1.3 Calculate payment due to individual employees to reflect standard pay and variations in accordance with employee source data	
2 Prepare payroll	2.1 Prepare payroll within designated timelines and in accordance with organisational policy and procedures	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Reconcile total wages for pay period, check or correct irregularities or refer to designated persons for resolution	
	2.3 Make arrangements for payment in accordance with organisational and individual requirements	
	2.4 Obtain authorisation of payroll and individual pay advice in accordance with organisational requirements	
	2.5 Produce, check and store payroll records in accordance with organisational policy and security procedures	
	2.6 Follow security procedures for processing payroll and for maintaining payroll records	
3 Handle payroll enquiries	3.1 Respond to payroll enquiries in accordance with organisational and legislative requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Provide information in accordance with organisational and legislative requirements	
	3.3 Ensure all enquiries outside area of responsibility and knowledge are referred to designated persons for resolution	
	3.4 Complete additional information or follow up action within designated timelines in accordance with organisational policy and procedures	

BSBFIA303 PROCESS ACCOUNTS PAYABLE AND RECEIVABLE

Element		Performance criteria	Please tick
1	Maintain financial journal systems	1.1 Check source documents for accuracy and appropriate authorisation	<input type="checkbox"/> Yes
		1.2 Refer errors and discrepancies in source documents for resolution in accordance with organisational policy and procedures	<input type="checkbox"/> No
		1.3 Enter transactions into cash and credit journal system in accordance with organisational policy and procedures and relevant legislation and compliance requirements	<input type="checkbox"/> Unsure
		1.4 Total credit journals in accordance with organisational policy and procedures	
2	Prepare bank reconciliations	2.1 Check cash journals against bank statements to identify differences	<input type="checkbox"/> Yes
		2.2 Update cash journals with relevant data from bank statement/s	<input type="checkbox"/> No
		2.3 Identify discrepancies and refer to appropriate staff member, organisation or agency	<input type="checkbox"/> Unsure
		2.4 Total cash journals in accordance with organisational policy and procedures	
		2.5 Prepare regular reconciliation reports within designated timelines	
3	Maintain accounts payable and accounts receivable systems	3.1 Enter transactions into individual accounts payable and accounts receivable in accordance with organisational policy and procedures and accounting requirements	<input type="checkbox"/> Yes
		3.2 Prepare schedules of accounts payable and accounts receivable for reconciliation purposes and in accordance with organisational requirements	<input type="checkbox"/> No
		3.3 Reconcile accounts payable and accounts receivable schedules with journal data or general ledger and in accordance with organisational requirements	<input type="checkbox"/> Unsure
4	Process payments for accounts payable	4.1 Reconcile accounts payable statements with accounting records and in accordance with organisational policy and procedures	<input type="checkbox"/> Yes
		4.2 Check payment documentation for accuracy of information and discrepancies and rectify errors in accordance with organisational requirements	<input type="checkbox"/> No
5	Prepare statements for accounts receivable	5.1 Produce and check accounts receivable statements for accuracy in accordance with organisational policy and procedures	<input type="checkbox"/> Unsure
		5.2 Rectify discrepancies and statements despatched within designated timelines	
6	Follow up outstanding accounts	6.1 Maintain accounts receivable ledger system in accordance with organisational requirements and to reflect current credit situation	<input type="checkbox"/> Yes
		6.2 Conduct aged-analysis of accounts receivable to identify outstanding accounts and to determine collection procedures in accordance with organisational requirements	<input type="checkbox"/> No
		6.3 Report or follow up outstanding accounts in accordance with organisational policy and procedures	<input type="checkbox"/> Unsure
		6.4 Monitor and review credit terms in accordance with credit policy and procedures	

BSBFIA304 MAINTAIN A GENERAL LEDGER

Element	Performance criteria	Please tick
1 Process journal entries	1.1 Prepare general journal entries from source journals in accordance with accounting requirements, organisational policy, procedures and legislative accounting standards	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Post journal entries into general ledger system in accordance with organisational policy, procedures and accounting standards	
	1.3 Reconcile accounts payable and accounts receivable subsidiary ledger systems with general ledger	
	1.4 Ensure processing maintains the accounting equation and is completed within designated timelines	
2 Prepare a trial balance	2.1 Prepare trial balance of general ledger system in accordance with organisational requirements and accounting standards, and ensure it is checked for accuracy	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Identify and rectify irregularities or refer them for resolution when trial balance does not balance, in accordance with organisational policy and procedures	

BSBITU312 CREATE ELECTRONIC PRESENTATIONS

Element	Performance criteria	Please tick
1 Prepare to create presentation	1.1 Organise personal work environment (including furniture and equipment) in accordance with ergonomic requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Identify purpose, audience and mode of presentation in consultation with content author or presenter	
	1.3 Identify organisational and task requirements relating to supporting documents and equipment	
	1.4 Select most appropriate application or platform to produce presentation, in accordance with available resources and organisational policies	
2 Create presentation	2.1 Plan and prepare slides, notes and handouts according to organisational and task requirements and image and style requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Use application functions for consistency of design and layout, to meet identified presentation requirements	
	2.3 Balance presentation features for visual impact and emphasis	
	2.4 Use advanced application features to streamline and customise presentation for different audiences	
	2.5 Prepare presentation within designated timeline	
	2.6 Use relevant help functions to overcome issues relating to presentation creation, if necessary	
3 Finalise presentation	3.1 Check presentation for spelling and consistency in presentation features and style, in accordance with task requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Prepare presentation materials for delivery in accordance with presenter or audience requirements	
	3.3 Name and store presentation appropriately, in accordance with organisational requirements and exit application without information loss	

BSBITU313 DESIGN AND PRODUCE DIGITAL TEXT DOCUMENTS

Element		Performance criteria	Please tick
1	Prepare to produce documents	1.1 Adjust workspace, furniture and equipment to suit user ergonomic environments	<input type="checkbox"/> Yes
		1.2 Ensure workspace meets organisational requirements related to work health and safety, and energy and resource conservation, taking into account the type of digital device to be used	<input type="checkbox"/> No
		1.3 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required	<input type="checkbox"/> Unsure
2	Design documents digitally	2.1 Design document structure and layout to suit purpose, audience and information requirements of task	<input type="checkbox"/> Yes
		2.2 Design document to enhance readability and appearance, and to meet organisational and task requirements for style and layout	<input type="checkbox"/> No
		2.3 Use available application functions to ensure consistency of design and layout, adhering to organisational and task requirements	<input type="checkbox"/> Unsure
		2.4 Insert a standard table into document, changing cells, columns, and rows as necessary to meet information requirements	
		2.5 Insert and format visual elements (including, for example, images or icons) to meet organisational and task requirements for style and layout	
3.	Produce text documents digitally	3.1 Use intermediate-level application functions to enable efficient production of digital text documents	<input type="checkbox"/> Yes
		3.2 Enter or import, and edit text and other data to meet task requirements	<input type="checkbox"/> No
		3.3 Preview, adjust and prepare documents for delivery in accordance with organisational and task requirements	<input type="checkbox"/> Unsure
		3.4 Name and store document, in accordance with organisational requirements and exit application without information loss/damage	
		3.5 Deliver document within designated timelines and organisational requirements for speed and accuracy	
		3.6 Use relevant help functions to overcome intermediate issues with document design and production	

BSBITU314 DESIGN AND PRODUCE SPREADSHEETS

Element		Performance criteria	Please tick
1	Select and prepare resources	1.1 Identify spreadsheet task purpose and audience	<input type="checkbox"/> Yes
		1.2 Identify task requirements in relation to data entry, storage, output, timeline and presentation format	<input type="checkbox"/> No
		1.3 Select most appropriate application to produce spreadsheet, in accordance with available resources and organisational policies	<input type="checkbox"/> Unsure
2	Plan spreadsheet design	2.1 Ensure spreadsheet design suits purpose, audience and information requirements of task	<input type="checkbox"/> Yes
		2.2 Ensure spreadsheet design enhances readability and appearance, and meets organisational and task requirements for style and layout	<input type="checkbox"/> No
		2.3 Use available application functions to ensure consistency of design and layout, adhering to organisational and task requirements	<input type="checkbox"/> Unsure
3	Create spreadsheet	3.1 Enter data, check and amend to maintain consistency of design and layout, in accordance with organisational and task requirements	<input type="checkbox"/> Yes
		3.2 Format spreadsheet using application functions to adjust page and cell layout to meet information requirements, in accordance with organisational style and presentation requirements	<input type="checkbox"/> No
		3.3 Ensure formulae are tested and used to confirm output meets task requirements, in consultation with appropriate personnel as required	<input type="checkbox"/> Unsure
		3.4 Use relevant help functions to overcome intermediate-level issues with spreadsheet design and production	
4	Produce intermediate-level charts	4.1 Select chart type and design that that offers analysis of numerical data, and meets organisational and task requirements	<input type="checkbox"/> Yes
		4.2 Create charts using appropriate data range in spreadsheet	<input type="checkbox"/> No
		4.3 Modify chart type and layout using formatting features, adhering to organisational and task requirements	<input type="checkbox"/> Unsure
5	Finalise and present spreadsheets	5.1 Review and edit final spreadsheet and any accompanying charts, and prepare for delivery in accordance with task requirements	<input type="checkbox"/> Yes
		5.2 Deliver document to relevant audience within designated timelines and in accordance with organisational requirements for speed and accuracy	<input type="checkbox"/> No
		5.3 Name and store spreadsheet appropriately in accordance with organisational requirements and exit application without data loss/damage	<input type="checkbox"/> Unsure

BSBITU306 DESIGN AND PRODUCE BUSINESS DOCUMENTS

Element	Performance criteria	Please tick
1 Select and prepare resources	1.1 Select and use appropriate technology and software applications to produce required business documents	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Select layout and style of publication according to information and organisational requirements	
	1.3 Ensure document design is consistent with company and/or client requirements, using basic design principles	
	1.4 Discuss and clarify format and style with person requesting document/publication	
2 Design document	2.1 Identify, open and generate files and records according to task and organisational requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Design document to ensure efficient entry of information and to maximise presentation and appearance of information	
	2.3 Use a range of functions to ensure consistency of design and layout	
	2.4 Operate input devices within designated requirements	
3 Produce document	3.1 Complete document production within designated timelines according to organisational requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Check document produced to ensure it meets task requirements for style and layout	
	3.3 Store document appropriately and save document to avoid loss of data	
	3.4 Use manuals, training booklets and/or help desks to overcome basic difficulties with document design and production	
4 Finalise document	4.1 Proofread document for readability, accuracy and consistency of language, style and layout prior to final output	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	4.2 Make any modifications to document to meet requirements	
	4.3 Name and store document in accordance with organisational requirements and exit application without data loss/damage	
	4.4 Print and present document according to requirements	

BSBITU309 PRODUCE DESKTOP PUBLISHED DOCUMENTS

Element		Performance criteria	Please tick
1	Prepare to produce desktop published documents	1.1 Use safe work practices including addressing ergonomic requirements and using work organisation strategies	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
		1.2 Use energy and resource conservation techniques	
		1.3 Identify document purpose, audience and presentation requirements, and clarify with relevant personnel as required	
		1.4 Identify organisational and task requirements for desktop published documents to ensure consistency of style and image	
2	Set up desktop published document	2.1 Design content structure and layout to ensure information and graphics are arranged according to related topics and in logical sequences	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
		2.2 Select appropriate formatting and create templates or master pages to ensure consistency of design and layout	
		2.3 Confirm layout with appropriate person	
3	Create desktop published document	3.1 Prepare, format and enter required text	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
		3.2 Import text from other applications and resolve any formatting issues	
		3.3 Scan or import graphics from other applications and resolve any formatting issues	
		3.4 Arrange text and graphics according to organisational and task requirements	
4	Finalise desktop published document	4.1 Review text for possible errors and omissions, and resolve any issues	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
		4.2 Check page order, structure and linkages	
		4.3 Produce completed document in required format	
		4.4 Name and store text documents, in accordance with organisational requirements and exit application without information loss/damage	
		4.5 Prepare text documents within designated timelines and organisational requirements for speed and accuracy	
		4.6 Use manuals, user documentation and online help to overcome problems with document design and production	

BSBWRT301 WRITE SIMPLE DOCUMENTS

Elements	Performance Criteria	Please tick
1 Plan document	1.1 Determine audience and purpose for the document	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Determine the format and structure	
	1.3 Establish key points for inclusion	
	1.4 Identify organisational requirements	
	1.5 Establish method of communication	
	1.6 Establish means of communication	
2 Draft document	2.1 Develop draft document to communicate key points	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Obtain and include any additional information that is required	
3 Review document	3.1 Check draft for suitability of tone for audience, purpose, format and communication style	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Check draft for readability, grammar, spelling, and sentence and paragraph construction	
	3.3 Check draft for sequencing and structure	
	3.4 Check draft to ensure it meets organisational requirements	
	3.5 Ensure draft is proofread, where appropriate, by supervisor or colleague	
4 Write final document	4.1 Make and proofread necessary changes	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	4.2 Ensure document is sent to intended recipient	
	4.3 File copy of document in accordance with organisational policies and procedures	

Elective Units Group B**BSBADM302 PRODUCE TEXTS FROM NOTES**

Elements	Performance Criteria	Please tick
1 Take notes	1.1 Identify organisational requirements relating to style, presentation and storage of documents prior to commencing the task	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Clarify the purpose and requirements of the text with author/speaker	
	1.3 Record notes with required degree of accuracy from appropriate sources	
	1.4 Clarify meaning and spelling of names or technical terms to ensure accuracy of the notes	
	1.5 Self check notes for accuracy	
2 Transcribe notes	2.1 Produce text from notes to the required degree of accuracy and to reflect the meaning intended by the author/speaker	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Produce text within designated time lines	
3 Edit and revise text	3.1 Self check final text for accuracy and grammar, and ensure syntax is appropriate for the intended purpose and audience of the text	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Revise, format, name, store and print text in accordance with organisational and task requirements	

BSBADM303 PRODUCE TEXT FROM AUDIO TRANSCRIPTS

Elements	Performance Criteria	Please tick
1 Prepare for audio transcription	1.1 Identify organisational requirements relating to style, presentation and storage of texts prior to commencing the task 1.2 Clarify purpose and requirements of the text with the author or supervisor	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
2 Transcribe from an audio source	2.1 Produce text using keyboarding techniques from an audio transcription with the required accuracy 2.2 Predict the meaning of any unclear speech from the context, or clarify with authors 2.3 Ensure text developed from the audio transcription conveys intended meaning 2.4 Clarify the spelling of names or any technical terms and punctuation to ensure accuracy and clarity of the text 2.5 Produce draft text within designated timelines 2.6 Self check draft text for accuracy	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
3 Edit and revise text	3.1 Circulate draft for checking in line with requirements of the organisation or originator of the audio transcription 3.2 Incorporate any amendments and self-check final text for accuracy, grammar and appropriateness for intended purpose and audience 3.3 Format, name, store, print and distribute final text in accordance with organisational and task requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure

BSBADM311 MAINTAIN BUSINESS RESOURCES

Elements	Performance Criteria	Please tick
1 Advise on resource requirements	1.1 Calculate estimates of future and present business resource needs in accordance with organisational requirements 1.2 Ensure advice is clear, concise and relevant to achieve organisational requirements 1.3 Provide information on the most economical and effective choice of equipment, materials and suppliers 1.4 Identify resource shortages and possible impact on operations	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
2 Monitor resource usage and maintenance	2.1 Ensure resource handling is in accordance with established organisational requirements including occupational health and safety requirements 2.2 Use business technology to monitor and identify the effective use of resources 2.3 Use consultation with individuals and teams to facilitate effective decision-making on the appropriate allocation of resources 2.4 Identify and adhere to relevant policies regarding resource use in the performance of operational tasks 2.5 Routinely monitor and compare resource usage with estimated requirements in budget plans	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
3 Acquire resources	3.1 Ensure acquisition and storage of resources is in accordance with organisational requirements, is cost effective, and consistent with organisational timelines 3.2 Acquire resources within available timelines to meet requirements 3.3 Review resource acquisition processes to identify improvements in future resource acquisitions	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure

BSBCMM301 PROCESS CUSTOMER COMPLAINTS

Elements	Performance Criteria	Please tick
1 Respond to complaints	1.1 Process customer complaints using effective communication according to organisational procedures established under organisational policies, legislation or codes of practice	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Obtain, document and review reports relating to customer complaints	
	1.3 Make decisions about customer complaints, taking into account applicable legislation, organisational policies and codes	
	1.4 Negotiate resolution of the complaint and obtain agreement where possible	
	1.5 Maintain a register of complaints/disputes	
	1.6 Inform customer of the outcome of the investigation	
2 Refer complaints	2.1 Identify complaints that require referral to other personnel or external bodies	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Make referrals to appropriate personnel for follow up in accordance with individual level of responsibility	
	2.3 Forward all documents and investigation reports	
	2.4 Follow up appropriate personnel to gain prompt decisions	
3 Exercise judgement to resolve customer service issues	3.1 Identify implications of issues for customer and organisation	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Analyse, explain and negotiate appropriate options for resolution with customer	
	3.3 Propose viable options in accordance with appropriate legislative requirements and enterprise policies	
	3.4 Ensure matters for which a solution cannot be negotiated are referred to appropriate personnel	

BSBCUS301 DELIVER AND MONITOR A SERVICE TO CUSTOMERS

Elements	Performance Criteria	Please tick
1 Identify customer needs	1.1 Use appropriate interpersonal skills to accurately identify and clarify customer needs and expectations	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Assess customer needs for urgency to determine priorities for service delivery according to organisational and legislative requirements	
	1.3 Use effective communication to inform customers about available choices for meeting their needs and assist in the selection of preferred options	
	1.4 Identify limitations in addressing customer needs and seek appropriate assistance from designated individuals	
2 Deliver a service to customers	2.1 Provide prompt service to customers to meet identified needs in accordance with organisational and legislative requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Establish and maintain appropriate rapport with customers to ensure completion of quality service delivery	
	2.3 Sensitively and courteously handle customer complaints in accordance with organisational and legislative requirements	
	2.4 Provide assistance or respond to customers with specific needs according to organisational and legislative requirements	
	2.5 Identify and use available opportunities to promote and enhance services and products to customers	
3 Monitor and report on service delivery	3.1 Regularly review customer satisfaction with service delivery using verifiable evidence according to organisational and legislative requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Identify opportunities to enhance the quality of service and products, and pursue within organisational and legislative requirements	

	3.3 Monitor procedural aspects of service delivery for effectiveness and suitability to customer requirements	
	3.4 Regularly seek customer feedback and use to improve the provision of products and services	
	3.5 Ensure reports are clear, detailed and contain recommendations focused on critical aspects of service delivery	

BSBDIV301 WORK EFFECTIVELY WITH DIVERSITY

Elements	Performance Criteria	Please tick
1 Recognise individual differences and respond appropriately	1.1 Recognise and respect individual differences in colleagues, clients and customers 1.2 Respond to differences sensitively 1.3 Ensure behaviour is consistent with legislative requirements and enterprise guidelines 1.4 Accommodate diversity using appropriate verbal and non verbal communication	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
2 Work effectively with individual differences	2.1 Recognise and document knowledge, skills and experience of others in relation to team objectives 2.2 Encourage colleagues to utilise and share their specific qualities, skills or backgrounds with other team members and clients in order to enhance work outcomes 2.3 Ensure relations with customers and clients demonstrate that diversity is valued by the business	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure

BSBFIA301 MANAGE FINANCIAL RECORDS

Elements	Performance Criteria	Please tick
1 Maintain daily financial records	1.1 Correctly maintain daily financial records in accordance with organisational and legislative requirements for accounting purposes 1.2 Identify and rectify or refer discrepancies or errors in documentation or transactions to designated persons in accordance with organisational and legislative requirements 1.3 Accurately credit and debit transactions and promptly enter into journals in accordance with organisational and legislative requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
2 Maintain general ledger	2.1 Maintain general ledger in accordance with organisational and legislative requirements 2.2 Post transactions into general ledger in accordance with organisational and legislative reporting requirements 2.3 Reconcile systems for accounts payable and receivable with general ledger 2.4 Accurately prepare trial balance from general ledger in accordance with organisational and legislative requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
3 Monitor cash control	3.1 Ensure cash flow is accurately accounted for in accordance with organisational and legislative requirements 3.2 Make and receive payments in accordance with organisational and legislative requirements 3.3 Collect or follow up outstanding accounts within designated timelines 3.4 Check payment documentation for accuracy of information and despatch to creditors within designated timeline	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure

BSBINM301 ORGANISE WORKPLACE INFORMATION

Elements	Performance Criteria	Please tick
1 Collect and assess information	1.1 Access product and service information in accordance with organisational requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Ensure methods of collecting information are reliable and make efficient use of available time and resources	
	1.3 Assess information for clarity, accuracy, currency and relevance to intended tasks	
	1.4 Use interpersonal skills to access relevant information from teams and individuals	
2 Organise information	2.1 Organise information in a format suitable for analysis, interpretation and dissemination in accordance with organisational requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Use appropriate technology/systems to maintain information in accordance with organisational requirements	
	2.3 Collate information and materials and communicate to relevant designated persons	
	2.4 Identify difficulties organising and accessing information and solve collaboratively with individuals and team members	
	2.5 Update and store information in accordance with organisational requirements and systems	
3 Review information needs	3.1 Actively seek feedback on clarity, accuracy and sufficiency of information to ensure relevance of information and system	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Review the contribution of information to decision making and implement appropriate modifications to collection processes	
	3.3 Identify future information needs and incorporate modifications to collection processes	
	3.4 Document future information needs and incorporate in modifications to reporting processes	

BSBINM302 UTILISE A KNOWLEDGE MANAGEMENT SYSTEM

Elements	Performance Criteria	Please tick
1 Access and use knowledge management system	1.1 Access knowledge management system to assist with specific tasks, in line with system procedures	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Administer system, in line with legislative, regulatory and organisational procedures	
2 Input to knowledge management system	2.1 Gather, analyse and prepare inputs for contribution to system, in line with procedures	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Check inputs for clarity, accuracy, currency and relevance	
	2.3 Make inputs to system, in line with procedures	
	2.4 Analyse requirements of the system and ensure suggestions for improvements are provided to relevant personnel	
3 Review and improve work practices	3.1 Provide feedback about clarity, accuracy, currency and relevance of system's output to relevant personnel	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Document learning resulting from use of the system	
	3.3 Improve work practices as a result of learning from use of the system	

BSBINM303 HANDLE RECEIPT AND DISPATCH OF INFORMATION

Elements	Performance Criteria	Please tick
1 Receive and distribute incoming mail	1.1 Check and register incoming mail to ensure accuracy of records	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Process court documents according to firm's policies and procedures	
	1.3 Process original documents according to firm's policies and procedures	
	1.4 Process served documents according to firm's policies and procedures	
	1.5 Identify and ensure understanding of titles and locations of company personnel and departments	
	1.6 Identify and promptly distribute urgent and confidential mail to addressee	
	1.7 Sort mail and despatch to nominated person/location	
	1.8 Record damaged, suspicious or missing items and report promptly where necessary	
2 Receive and despatch outgoing mail	2.1 Collect outgoing mail from each section of the firm, check and sort all items to ensure they are correctly prepared for despatch	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Determine most appropriate delivery method and select appropriate envelopes and address correctly	
	2.3 Process outgoing mail correctly	
	2.4 Record mail in register	
	2.5 Sort mail according to carrier	
	2.6 Despatch mail using most appropriate delivery method	
	2.7 Despatch mail to meet designated timelines	
3 Collate and despatch documents for bulk mailing	3.1 Estimate quantities/resources/time to complete bulk mailing of documents correctly	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Collate documents as required	
	3.3 Sort envelopes and batch in accordance with specifications	
	3.4 Employ bulk mail interstate satchels where appropriate	
	3.5 Self check numerical information	
	3.6 Lodge batched items in time for delivery by relevant carrier	
4 Organise urgent and same day deliveries	4.1 Weigh, package and address items for urgent delivery	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	4.2 Determine and select cheapest and best option for urgent delivery	
	4.3 Conduct a follow up if necessary	

BSBINN201 CONTRIBUTE TO WORKPLACE INNOVATION

Elements	Performance Criteria	Please tick
1 Identify opportunities to do things better	1.1 Be aware of own role in workplace innovation	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Proactively identify opportunities for improvement in own area of work	
	1.3 Gather and review information which may be relevant to ideas and which might assist in gaining support for ideas	
2 Discuss and develop ideas with others	2.1 Identify people who could provide input into ideas for improvements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Select the best way of approaching people to begin sharing ideas	
	2.3 Seek feedback on improvement of ideas, and discuss and develop options and possible variations	
	2.4 Review and select ideas for follow up based on feedback and further review	
3 Address the practicalities of change	3.1 Take action to implement routine changes in consultation with others and within scope of own responsibility	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Identify and articulate issues and practical processes for implementing proposed ideas	
	3.3 Present ideas and practical suggestions to the appropriate people about how improvements could be made	

BSBITU311 USE SIMPLE RELATIONAL DATABASES

Elements	Performance Criteria	Please tick
1 Create a simple database	1.1 Plan a simple one-to-one relational database, using a database application, basic design principles, software functions and simple formulae	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Develop a table with fields and attributes according to database usage, as well as data considerations and user requirements	
	1.3 Create a primary key for each table	
	1.4 Create a relationship between the two tables by assigning a foreign key	
	1.5 Modify table layout and field attributes as required	
	1.6 Check and amend data entered, in accordance with organisational and task requirements	
2 Create reports and queries	2.1 Identify information output, database tables to be used and report layout, in accordance with task requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Identify data groupings, search and sort criteria, in accordance with task requirements	
	2.3 Run reports and queries to check that results and formulae provide the required data	
	2.4 Modify reports to include or exclude additional requirements, where necessary	
3 Use database	3.1 Ensure data input meets designated timelines and organisational requirements for speed and accuracy	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Use help functions to overcome simple issues with database design and production	
	3.3 Preview, adjust and produce database reports or forms in accordance with organisational and task requirements	
	3.4 Name and store databases, in accordance with organisational requirements, and exit application without data loss or damage	
	3.5 Prepare and distribute reports to appropriate personnel in a suitable format	

BSBITU315 PURCHASE GOODS AND SERVICES ONLINE

Elements	Performance Criteria	Please tick
1 Identify suitable suppliers online	1.1 Identify purpose for goods or services to be procured	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Conduct research to identify potential suppliers of required goods/services by accessing a range of digital sources/marketplaces	
	1.3 Assess service provider confidentiality, security and privacy facilities in accordance with individual and organisational requirements	
	1.4 Assess potential products/services for authenticity	
	1.5 Select most appropriate supplier of goods/services, in accordance with organisational budget, policies, and procedures	
2 Procure goods or services online	2.1 Engage with supplier in a professional and appropriate manner via the relevant online platform	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Identify risks in the digital transfer of information and take steps to ensure that information is secured in accordance with organisational requirements	
	2.3 Place purchase order with the relevant supplier using appropriate online functions to obtain required goods/services	
	2.4 Report any difficulties in accessing or using online facilities to the supplier as required	
	2.5 Make payment or receive invoice to complete transaction in accordance with terms of online transaction and organisational policies and procedures	
3 Maintain records of online transactions	3.1 Maintain banking and other records of transactions in accordance with organisational policy, procedures and level of authority	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Compare organisational records with online records and deal with irregularities according to organisational policy and procedures	
	3.3 Review goods/services obtained, assessing quality, timeliness, and level of customer service	

BSBPRO301 RECOMMEND PRODUCTS AND SERVICES

Elements	Performance Criteria	Please tick
1 Develop and maintain knowledge of products and services	1.1 Actively and regularly research knowledge and understanding of industry products and services using authoritative sources	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Use available product and service documentation to identify and understand characteristics of products and services, and to make comparisons with other products and services	
	1.3 Accurately document and maintain information on products and services in a format consistent with organisational requirements	
	1.4 Apply acquired knowledge to improve quality within personal work areas	
2 Recommend products and services	2.1 Ensure that recommendations on products and services are in line with organisational requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Provide recommendations that emphasise product and service issues relevant to client needs	
	2.3 Ensure that evidence in support of recommendations is verifiable and presented in a suitable format	
	2.4 Structure recommendations to identify clear benefits to clients and the organisation	

3 Advise on promotional activities	3.1 Provide advice that is clear, is supported by verifiable evidence and is compatible with organisational requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Ensure that promotional documentation and materials are appropriate to presentation of the organisation's products and services	
	3.3 Ensure that costs of promotional activities conform to budget resources	
	3.4 Estimate impact of promotional activities from verifiable customer feedback sources	
	3.5 Evaluate the benefits of promotional activities and incorporate in plans for future promotional activities	

BSBSUS201 PARTICIPATE IN ENVIRONMENTALLY SUSTAINABLE WORK PRACTICES

Elements	Performance Criteria	Please tick
1 BSBSUS201	1.1 Identify workplace environmental and resource efficiency issues	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Identify resources used in own work role	
	1.3 Document and measure current usage of resources using appropriate techniques	
	1.4 Record and file documentation measuring current usage, using technology (such as software systems) where applicable	
	1.5 Identify and report workplace environmental hazards to appropriate personnel	
2 Comply with environmental regulations	2.1 Follow workplace procedures to ensure compliance	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Report breaches or potential breaches to appropriate personnel	
3 Seek opportunities to improve resource efficiency	3.1 Follow organisational plans to improve environmental practices and resource efficiency	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Work as part of a team, where relevant, to identify possible areas for improvements to work practices in own work area	
	3.3 Make suggestions for improvements to workplace practices in own work area	

BSBWOR204 USE BUSINESS TECHNOLOGY

Elements	Performance Criteria	Please tick
1 Select and use technology	1.1 Select appropriate technology and software applications to achieve requirements of the task	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Adjust workspace, furniture and equipment to suit user's ergonomic requirements	
	1.3 Use technology according to organisational requirements and in a way that promotes a safe work environment	
2 Process and organise data	2.1 Identify, open, generate or amend files and records according to task and organisational requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Operate input devices according to organisational requirements	
	2.3 Store data appropriately and exit applications without damage to or loss of data	
	2.4 Use manuals, training booklets and/or online help or helpdesks to overcome basic difficulties with applications	
3 Maintain technology	3.1 Identify and replace used technology consumables in accordance with manufacturer's instructions and organisational requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Carry out and/or arrange routine maintenance to ensure equipment is maintained in accordance with manufacturer's instructions and organisational requirements	
	3.3 Identify equipment faults accurately and take action in accordance with manufacturer's instructions or report fault to designated person	

BSBWOR301 ORGANISE PERSONAL AND WORK PRIORITIES AND DEVELOPMENT

Elements	Performance Criteria	Please tick
1 Organise and complete own work schedule	1.1 Ensure that work goals, objectives or Key Performance Indicators (KPIs) are understood, negotiated and agreed in accordance with requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Assess and prioritise workload to ensure tasks are completed within timeframes	
	1.3 Identify factors affecting the achievement of work objectives and incorporate contingencies into work plans	
	1.4 Use business technology efficiently and effectively to manage and monitor scheduling and completion of tasks	
2 Monitor own work performance	2.1 Accurately monitor and adjust personal work performance through self-assessment to ensure achievement of tasks and compliance with legislation and work processes or KPIs	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Ensure that feedback on performance is actively sought and evaluated from colleagues and clients in the context of individual and group requirements	
	2.3 Routinely identify and report on variations in the quality of and products and services according to organisational requirements	
	2.4 Identify signs of stress and effects on personal wellbeing	
	2.5 Identify sources of stress and access supports and resolution strategies	
3 Co-ordinate personal skill development and learning	3.1 Identify personal learning and professional development needs and skill gaps using self-assessment and advice from colleagues and clients in relation to role and organisational requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Identify, prioritise and plan opportunities for undertaking personal skill development activities in liaison with work groups and relevant personnel	
	3.3 Access, complete and record professional development opportunities to facilitate continuous learning and career development	
	3.4 Incorporate formal and informal feedback into review of further learning needs	

BSBWOR302 WORK EFFECTIVELY AS AN OFF-SITE WORKER

Elements	Performance Criteria	Please tick
1 Negotiate off-site working arrangements	1.1 Identify and include legal and ethical issues relating to off-site work in working arrangements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	1.2 Identify and include worker rights and responsibilities and those of supervisor/s and the organisation, in off-site working arrangements	
	1.3 Agree and document off-site work employment conditions and agreement in accordance with legal requirements	
	1.4 Confirm equipment and technology requirements for off-site work, and agree and document supply and maintenance arrangements in accordance with legal and organisational requirements	
	1.5 Confirm supervisory and performance management arrangements and agree to requirements for any on site work, meetings or events in accordance with off-site work policy and practices	
2 Organise off-site work environment	2.1 Identify requirements for a safe, effective off site work environment in consultation with management	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	2.2 Obtain equipment and technology for off-site work environment in accordance with work agreement	
	2.3 Arrange off site work environment in accordance with work health and safety (WHS) requirements and work agreement	
3 Plan off-site work schedules	3.1 Establish work objectives and priorities in consultation with management	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	3.2 Analyse and incorporate work requirements into personal work schedules	
	3.3 Identify factors affecting achievement of work objectives and address contingencies in work schedules	
4 Complete off-site work	4.1 Complete or revise work schedules in accordance with organisational requirements	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	4.2 Schedule and attend on site work, meetings or events in accordance with organisational requirements	
	4.3 Seek assistance regarding breakdowns in work arrangements, equipment or technology and adjust work schedules in accordance with organisational requirements	
	4.4 Ensure work practices meet WHS requirements and terms of the work agreement	
5 Monitor and improve off-site work performance	5.1 Monitor personal performance against work requirements and schedules and identify any areas for improvement	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
	5.2 Obtain feedback from colleagues and clients, and analyse in context of personal and organisational objectives	
	5.3 Evaluate off-site work processes and systems for their usefulness in assisting work outcomes and make recommendations for improvement in accordance with organisational requirements	
	5.4 Negotiate changes to off-site work practices and implement in accordance with organisational requirements and work agreement	
	5.1 Monitor personal performance against work requirements and schedules and identify any areas for improvement	

BSBWHS401 IMPLEMENT AND MONITOR WHS POLICIES, PROCEDURES AND PROGRAMS TO MEET LEGISLATIVE REQUIREMENTS

Elements	Performance Criteria	Please tick
1 Provide information to the work team about WHS policies and procedures	1.1 Accurately explain to the work team relevant provisions of WHS Acts, regulations and codes of practice 1.2 Provide information about the organisation's WHS policies, procedures and programs, and ensure it is readily accessible to, and understandable by the work team 1.3 Regularly provide and clearly explain to the work team information about identified hazards and the outcomes of risk assessment and control	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
2 Implement and monitor participation arrangements for managing WHS	2.1 Communicate to workplace parties the importance of effective consultation mechanisms in managing health and safety risks in the workplace 2.2 Apply consultation procedures to facilitate participation of the work team in managing work area hazards 2.3 Promptly deal with issues raised through consultation, according to organisational consultation procedures and WHS legislative and regulatory requirements 2.4 Promptly record and communicate to the work team the outcomes of consultation over WHS issues	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
3 Implement and monitor organisational procedures for providing WHS training	3.1 Identify WHS training needs according to organisational requirements and WHS legislative and regulatory requirements 3.2 Make arrangements to meet WHS training needs of team members in consultation with relevant individuals 3.3 Provide workplace learning opportunities and coaching and mentoring assistance to facilitate team and individual achievement of identified WHS training needs 3.4 Identify and report to management the costs associated with providing training for work team, for inclusion in financial and management plans	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
4 Implement and monitor organisational procedures and legal requirements for identifying hazards and assessing and controlling risks	4.1 Identify and report on hazards in work area according to WHS policies and procedures and WHS legislative and regulatory requirements 4.2 Promptly action team member hazard reports according to organisational procedures and WHS legislative and regulatory requirements 4.3 Implement procedures to control risks using the hierarchy of control, according to organisational and WHS legislative requirements 4.4 Identify and report inadequacies in existing risk controls according to hierarchy of control and WHS legislative requirements 4.5 Monitor outcomes of reports on inadequacies, where appropriate, to ensure a prompt organisational response	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure
5 Implement and monitor organisational procedures for maintaining WHS records for the team	5.1 Accurately complete and maintain WHS records of incidents of occupational injury and disease in work area, according to WHS policies, procedures and legislative requirements 5.2 Use aggregate information and data from work area records to identify hazards and monitor risk control procedures in work area	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure

EVIDENCE CHECKLIST

BSB30415 Certificate III in Business Administration

To be completed by the Applicant.

.....
Applicant Full Name

.....
Today's Date

What evidence do you have that you can substantiate the unit competencies?

Please tick the units you are seeking below, then please detail in a separate document, entitled Evidence Checklist, in your own words, how you feel you are competent in each of the units for which you are seeking RPL (Recognition of Prior Learning). Some duplication may be natural. A suggestion for length would be 3 typed paragraphs for each item or handwrite a full page. If you are seeking recognition for specific units only, please tick only those units below and reflect this content in your paragraphs.

CORE Units (2 units out of 2 to be ticked)	RPL or Credit Transfer (CT) or Study Unit – please tick your preference		
BSBITU307 Develop keyboarding speed and accuracy - What version of Word do you use? <input type="checkbox"/> 2007 <input type="checkbox"/> 2010 <input type="checkbox"/> 2013 <input type="checkbox"/> 2016	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBWHS201 Contribute to health and safety of self and others	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
ELECTIVE Units – GROUP A (7 units to be ticked)			
BSBADM307 Organise schedules (General administration focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBFIA302 Process payroll (Financial administration focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBFIA303 Process accounts payable and receivable (Financial administration focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBFIA304 Maintain a general ledger (Financial administration focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBITU312 Create electronic presentations (using PowerPoint) (IT focus) - What version of PowerPoint do you use? <input type="checkbox"/> 2010 <input type="checkbox"/> 2013 <input type="checkbox"/> 2016	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBITU313 Design and produce digital text documents (IT focus) - What version of Office do you use? <input type="checkbox"/> 2010 <input type="checkbox"/> 2013 <input type="checkbox"/> 2016	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBITU314 Design and produce spreadsheets (using Excel) (IT focus) - What version of Excel do you use? <input type="checkbox"/> 2010 <input type="checkbox"/> 2013 <input type="checkbox"/> 2016	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBITU306 Design and produce business documents (IT focus) - What version of Office do you use? <input type="checkbox"/> 2007 <input type="checkbox"/> 2010 <input type="checkbox"/> 2013 <input type="checkbox"/> 2016	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBITU309 Produce desktop published documents (using Publisher) (IT focus) - What version of Publisher do you use? <input type="checkbox"/> 2007 <input type="checkbox"/> 2010 <input type="checkbox"/> 2013 <input type="checkbox"/> 2016	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBWRT301 Write simple documents (General writing focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
ELECTIVE Units – GROUP B (4 units to be ticked – these 4 can be either from this Group B below or from any remaining units in Group A above)			
BSBADM302 Produce texts from notes (General administration focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBADM303 Produce texts from audio transcription (General administration focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBADM311 Maintain business resources (General administration focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBCMM301 Process customer complaints (Interpersonal communication focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>

BSBCUS301 Deliver and monitor a service to customers (Customer service focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBDIV301 Work effectively with diversity (Diversity focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBFIA301 Maintain financial records (Financial administration focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBINM301 Organise workplace information (Information management focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBINM302 Utilise a knowledge management system (Information management focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBINM303 Handle receipt and despatch of information (Information management focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBINN201 Contribute to workplace innovation (Innovation focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBITU311 Use simple relational databases (using Access) (IT focus) - What version of Access do you use? <input type="checkbox"/> 2010 <input type="checkbox"/> 2013 <input type="checkbox"/> 2016	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBITU315 Purchase goods and services online (IT focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBPRO301 Recommend products and services (Product skills and advice focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBSUS201 Participate in environmentally sustainable work practices (Sustainability focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBWOR204 Use business technology (IT focus) What version of Office do you use? <input type="checkbox"/> 2007 <input type="checkbox"/> 2010 <input type="checkbox"/> 2013 <input type="checkbox"/> 2016	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBWOR301 Organise personal work priorities and development (Workplace effectiveness focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBWOR302 Work effectively as an off-site worker (Workplace effectiveness focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>
BSBWHS401 Implement and monitor WHS policies, procedures and programs to meet legislative requirements (WHS focus)	RPL <input type="checkbox"/>	CT <input type="checkbox"/>	Study Unit <input type="checkbox"/>

[Office use only below here]

Is practical workplace activity observation/interview required?Yes / No

Has third party verification of evidence been completed satisfactorily?.....Yes / No

Is gap training required?Yes / No

Does applicant need to be contacted?Yes / No

If contact required, state reason:

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Reporting action needed:

RPL Granted Report	RPL Not Granted Report	Defer RPL until evidence gathered
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Details of further action since first submission (if applicable):

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This Assessment was completed on behalf of The National Finance Institute by:

Name of Assessor:

Assessor's Signature Date of Review:

Decision