

Records Management

Based on SAQA's Unit Standard 110009, NQF Level 4, 4 Credits | 4 OPISA CPD Points

Introduction

Your business revolves around documents-correspondence, contracts, charts, memos, orders, reports and much more that record what your company does. Many of these records are kept on paper and keeping it organised is essential to ensuring your business stays on track.

What to keep, where to keep it and for how long are the factors that determine whether information is available when you need it. Having the right documents in the right place at the right time also helps you control costs and reduce issues with lost information. The impact that proper records management has on your business can't be exaggerated. In most businesses, storing records is a major commitment of both space and time. It's a good practice to manage both well.

Course Objectives

- Perform daily business transactions more efficiently
- Waste less employee time with faster record retrieval
- Protect against accidental or premature record destruction
- Prevent costly paper accumulation with systematic record disposal
- Secure vital records and information in case of business disruption or disaster
- Reclaim office space used for inefficient storage
- Access documents that demonstrate regulatory and legislative compliance
- Build confidence and pride from knowing you've done an important job well

Course Outline

Control and deal with confidential information and documents

- Confidential information is defined and described for a specific organisation
- The system and procedures used for dealing with confidential information is explained with examples
- Documents are secured in an appropriate manner and within an agreed time frame
- Utmost care is taken to avoid compromising any relevant stakeholder
- Control and evaluate ordering and distribution of office stationery
- The administrative requirements are identified to meet the A plan is presented to effectively control office stationery policies, procedures and strategies
- Plans are developed on how to monitor, maintain and improve stock levels in accordance with organisational requirements
- Effective shrinkage controls are developed and implemented for an organisation
- Evidence of accurate reports are produced reflecting stationery movements for a given period

- The control of the administration system and procedures is explained and applied to ensure effective administering of stationery
- Documentation used for the control of stationery in an accurate, complete way, which complies with requirements is explained to employees
- Effective stationery control procedures, systems and follow up actions are evaluated and explained

Implement control measures with individuals

- Contracted control measures are implemented and non-conformances are identified for reporting to people with the authority to deal with them
- Non-conformances are recorded and corrective actions negotiated according to organisational requirements
- Reported non-conformance is handled in accordance with organisational policies and procedures and is recorded