THE LEARNING DEVELOPMENT GROUP

Record Keeping

SERVICES SETA Statement of Results

US ID:	14339 & 14340
NQF Level:	2
Credits:	9

Introduction

This accredited, short programme is Unit Standard aligned and aimed at individuals who maintain records and filing management systems.

The programme is practical and theory-based with a strong focus on the need for accuracy and confidentiality when dealing with paper-based and electronic record management.

It covers the reasons for filing and keeping records, different types of records, contracts and agreements, the context and purpose of maintaining confidentiality, using established storage and retrieval systems and booking filing in and out of a system timeously and meticulously. It details how to classify and cross refence different types of documentation.

Target Audience

This short programme is aimed at those working in administration, record keeping and fling in business and office environments.

It is suitable for fling clerks, junior secretaries, office administrators, junior records managers and archivists.

Entry Requirements

- A GETC or equivalent qualification.
- Competence in Communication Literacy at NQF Level 1.
- Competence in Mathematical Literacy at NQF Level 1.
- Computer Literacy at NQF Level 1.

Additional Requirements

- You will need access to appropriate workplace activities.
- Access to a PC, software and the internet.

Course Delivery & Assessment

We use in-classroom, virtual classroom and blended interactive, facilitated training, group discussions and practical exercises to embed skills.

You will need to:

- Attend all scheduled sessions.
- Demonstrate theoretical and practical understanding of course content.
- Complete and present practical assignments.
- Participate in group activities and discussions.
- Compile and submit a Portfolio of Evidence (PoE).

To receive your Statement of Results, Record Keeping, you will need to compile, submit and be found competent on a Portfolio of Evidence (PoE).

Learning Outcomes

By the end of the short programme, you will be able to:

- Explain why companies record and keep information.
- Name and describe types of records specific to contracts and agreements within a selected business sector.
- Understand the context and purpose of maintaining confidentiality when preparing, updating and releasing records
- Store and retrieve information using an established storage system
- File paper-based and electronic documentation and other reference material
- Book items in and out of the system and trace missing items
- Classify and cross-reference simple information.
- Understand the significance of maintaining confidentiality.

Course **Content**

Short Programme: Record Keeping

Accreditation Body: SERVICES SETA

| SAQA ID: 14339 | NQF Level: 2 | Credits : 5
| SAQA ID: 14340 | NQF Level: 2 | Credits : 4

Module 1: Identify & Maintain the Types of Records Required in own Industry & Understand Why it is Necessary to Create Evidence & Maintain Confidentiality

- Explain why companies record and keep information
- Types of information contained in records
- Methods of creating records using technology
- The purpose and role of records in an organisation
- Name and describe the type of records that are specific to a contract in a selected business sector
- The purpose of keeping records for contracts, agreements and quotations
- Client record keeping
- Locate and provide records to users on request
- Use paper-based and electronic filing systems
- Locate, access and retrieve data according to an organisation's service levels
- Understand the reason for supplying only authorized people with confidential records
- Maintain confidentiality of customer and company information
- Recognise violations of company confidentiality procedures
- Carry out work activities according to a Code of Conduct

Module 2: Maintain an Existing Information System in a Business Environment

- Store information using an existing storage system
- Classify, sort and record paper-based documentation
- Store information safely in the correct location and sequence
- Classify and cross-reference information correctly
- Archive information according to an organisation's procedures
- Understand the implications to productivity of mis-filing information
- Create, label and file electronic information safely and securely according to an organisation's requirements and procedures
- Locate, copy and dispatch filing within timeframes and standards
- Retrieve information from an existing storage system promptly
- Communicate delays in record retrieval to the correct person
- Record retrieved records
- Store valuable documentation and reference materials securely
- Follow processes for securing valuable information correctly
- Explain the importance of following security procedures meticulously when record keeping
- Identify security risks to record keeping
- Recognise and report security violations

info@ldgroup.co.za

+27 086 022 7337

www.ldgroup.co.za

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