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Before you begin

This learner guide is based on the unit of competency *TLIE2008 Process workplace documentation*, Release 1. Your trainer or training organisation must give you information about this unit of competency as part of your training program. You can access the unit of competency and assessment requirements at: www.training.gov.au.

How to work through this learner guide

Your trainer will advise which parts of the learner guide you need to read, and which activities you need to complete. This learner guide will help you in your training.

Icon	Feature	How you can use each feature
	Learning content	Read each topic. Speak to your trainer if you need help.
	Activities	Activities give you the opportunity to put your skills and knowledge into action. Your trainer will tell you which activities to complete.
	Video clips	Where you see a QR code, you can use a smartphone or tablet to access video clips about the content. For information about how to download an app that will read the QR code, or for more help, visit our website: www.aspirelr.com.au/help
	Workplace examples	Workplace examples at the end of each topic show how your learning applies in practice.
	Summaries	Key learning points are provided at the end of each topic.
	Words to remember	<p>As you read the learner guide, use the table at the back of the book to write down any words you need to remember.</p> <p>There is a space for you to write the word and a space for you to write down what the word means.</p> <p>You can also access a full glossary of terms via this QR code.</p>





Topic 1 | What you need to know about processing workplace documentation

Before completing workplace documentation, you need to identify and confirm the purpose of the documents to be completed. You will need to collect and organise the information to be recorded and make sure it is correct.

In this topic you will learn about:

1A The purpose of documentation

1B How to organise information to complete documentation

It is important to follow workplace procedures for completing and processing documentation. This will ensure you comply with relevant laws and regulations.

You will need to interpret, analyse and organise information, then communicate it to the correct person in a timely manner.

Rules for processing workplace documentation

Documentation needs to be completed in accordance with protocols and procedures.

Some types of workplace documentation are required by law. It is therefore essential to follow requirements for completing these documents and to complete them accurately.

Your workplace has a legal requirement to complete documentation related to regulations, standards and codes of practice, such as dangerous goods and freight regulations. These may include load limits, health and safety legislation, equal employment legislation and environmental protection regulations.

Protocols and procedures are implemented to ensure documentation is legally binding. These procedures must be easy to access in the workplace.



Follow these rules when processing documentation.

Maintain privacy

If documentation contains personal information, such as names and addresses, you must ensure this information remains private. This is in accordance with the *Privacy Act 1988* (Cth). Keep documents containing personal information in a locked file, or password-protected computer system. Check you are sending to the correct email recipient if you are emailing documentation containing personal details.

Be concise

Complete transport memos, daily diaries and logs efficiently, but accurately. Some workplaces use shorthand or abbreviations. Ensure you know when and how to use these. Unless required, avoid wasting time recording events in excessive detail. Just ensure the relevant information is correctly recorded.

Be accurate

Accuracy is important when completing documentation. Names and dates must be spelt and recorded correctly. If you are documenting where and how goods are located or stored, ensure the product is correctly recorded. Inaccuracies can lead to workplace errors, which can cause safety issues, damage to goods and loss of productivity.

Check for quality

Quality assurance checking should be completed each time documentation is completed. This not only provides consistency but also a monitoring system to correct any process issues. Ask your supervisor or a colleague to check for discrepancies.

1B

How to organise information to complete documentation

You will need to collect, interpret, analyse and organise documentation so the appropriate action is taken, in the appropriate time frame.

Whether documents are one-off incident reports, or regular records of daily activities, it is necessary to ensure information is interpreted correctly and that the right person receives the right information. For example, all staff should know when and how to complete daily activity diaries and when to review them. Transport operators should know when and how to complete transport logs and how to review them. It is also essential to know how to read and respond to a transport memo, SDS or WHS incident report.

Important documentation requiring immediate action needs to be readily accessible and the appropriate personnel should be alerted.

Documentation requirements

Always follow documentation requirements when completing and organising forms, logs and diaries.

Workplace procedures – which are based on privacy, WHS and environmental protection legislation – should be followed when interpreting, analysing and organising documentation.

Forms such as incident reports, risk assessments and hazard reports need to be completed accurately and according to procedures.

The following guidelines will help you to meet documentation requirements.

Workplace documentation requirements

- Follow privacy protocols.
- Be accurate and precise.
- Pay attention to detail.
- Alert appropriate personnel if required.
- Store documentation appropriately.

Standard forms

- Ensure details are accurate.
- Include relevant details, such as date, time and place of incident.
- Fill in all required fields.
- Follow the instructions on the form.
- Store forms in the appropriate place.

Logs and diaries

- Complete entries regularly.
- Keep copies of receipts, such as fuel dockets.
- Alert supervisor if non-compliance is noted.



Activity 2

Question 1

List **two** situations when you are required to interpret information to complete a workplace task.

Question 2

Give **two** examples of information sources you could use to help you complete workplace documentation.

Question 3

Draw a line from the beginning of the sentence on the left to match the end of the sentence on the right.

- | | |
|--|---|
| * When you experience technical problems | * pay attention to detail and watch out for discrepancies. |
| * When data is lost or missing | * your supervisor and the receiver must be notified immediately. |
| * When you are processing documentation | * talk to the technical team about what to do. |
| * When incorrect information has been passed on | * talk to your professional body for advice. |
| * When you find out-of-date codes or forms being used in the workplace | * complete as much of the form as you can, then speak to your supervisor. |

Question 4

Circle the correct ending to complete the sentence.

Always follow procedures for completing documentation, including

- * privacy protocols and accuracy.
- * deleting current information.



Read the following workplace example to see how the concepts you have learned are applied in a real-life situation.

Workplace example for Topic 1

Tara and Dave work for Warehouse Manufacturing Supplies. Tara is Dave's supervisor. She has asked Dave to inform the drivers that power lines have come down on the Pacific Highway and there is a significant traffic block expected to last three hours.

Dave thinks about which documentation he needs to complete. He decides a transport memo is needed to inform the drivers. He prepares a draft SMS and shows it to Tara. Tara says it is good to send.

Tara asks Dave to find out how the delay will affect schedules, make a record of the situation and inform the stakeholders.

Dave phones each of the drivers to discuss driving times. He reviews the schedules on the internal network. He looks up the customer database and phones the two customers who will be affected by the delay.

He also records the details in the daily activity diary and prepares an incident report which he submits to Tara.



Summary of Topic 1

1. Identify the purpose of workplace documentation. For example, transport memos are intended to advise workers about changes to schedules.
2. Follow workplace procedures when processing documentation. These relate to privacy, accuracy and efficiency.
3. Know how to complete WHS incident reports. Always report in a timely manner.
4. People working in transport and logistics have a duty of care to report non-compliance and hazards.
5. Interpret information to know which document needs to be completed and when.
6. Analyse information to assess the priority, and know how to complete documentation.
7. Organise documentation ensuring privacy protocols are met and the correct person is informed about information.
8. Information can be sourced from various places. For instance, information for WHS reports can be sourced from observations in the workplace.
9. The purpose of logs and diaries is to record daily activities. Logs and diaries help track processes, communicate with others and identify potential problems.
10. Watch out for problems when processing documentation, such as missing data, technology that isn't working or incorrect information. Speak to your supervisor about how to respond.



Topic 2 | What you need to do to process workplace documentation

In the transport and logistics industry, documentation is essential to serve customers, fulfil legal requirements and keep people safe.

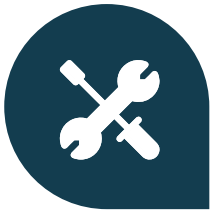
In this topic you will learn how to:

2A Prepare documentation

2B Complete documentation

Documents are handled and read by a number of people. Therefore, it is important that the information in documents is clear, easily understood and accurate.

You may need to enter information into a computer or fill in forms, logbooks or diaries, according to your workplace procedures and policies.



Read the following workplace example to see how the concepts you have learned are applied in a real-life situation.

Workplace example for Topic 2

Tara and Dave work for Warehouse Manufacturing Supplies. Tara is inducting staff into using the new integrative logistics software which will help the company plan routes, schedule deliveries, and communicate with operators more efficiently.

The team have been given handheld devices to practise using the software. Dave's device is turning on but he cannot bring up the software.

He speaks to Su Lin, the technical expert, about the problem. Su Lin recommends Dave turn the device off and on again. It works.

On his first job using the new software, Dave records his first pick up. He enters the time and date into the delivery schedule and presses a button to insert the customer's signature on the schedule. She is able to sign his device directly.

Tara is pleased with the team's first day using the software.



Summary of Topic 2

1. Prepare to complete documentation by familiarising yourself with procedures and legislation, such as privacy protocols.
2. Identify the purpose of the document, the information you need to complete it, and how to process it.
3. Use computer-based technology such as integrated software, apps, handheld devices and computers to complete documentation.
4. Pay attention to detail when entering data to ensure no mistakes are made.
5. Maintain logs or diaries accurately at the time of event and ensure no details are omitted.
6. Adapt to problems or changes in technology by communicating with technical staff and undergoing training when it is provided.
7. Interpret the information you obtain to decide how to process it.
8. Read and analyse documents systematically to ensure all information is included and the correct action is taken.
9. Collaborate with technicians, suppliers, manufacturers, your supervisor, your co-workers and customers to ensure documentation is completed accurately.
10. Ensure documents are completed in a timely manner.