

Unit 209 Store, retrieve and archive information

Unit summary

Use a manual or electronic information system to store, retrieve and archive information.

Skills

You will apply the following skills:

- Planning
- Organising
- Reading
- Writing
- Using number
- Problem solving
- Communicating
- Using technology

Performance indicators

You will:

Process information

1. Identify and collect required information
2. Follow agreed procedures and legislation for maintaining security and confidentiality
3. Store information accurately in approved locations
4. Update information as required

Retrieve information

5. Confirm information for retrieval
6. Comply with procedures and legislation for accessing an information system
7. Locate and retrieve the required information
8. Identify and report problems with information systems
9. Provide information in the agreed format and within agreed timescales

Archive information

10. Confirm information to be archived
11. Comply with procedures and legislation for archiving information
12. Archive information correctly and within agreed timescales

13. Maintain a record of archived information
14. Retrieve archived records on request

Knowledge

You will know:

1. Why it is important to store, retrieve and archive information effectively and efficiently
2. The different information systems and their main features
3. Legal and organisational requirements covering the security and confidentiality of information
4. Why it is important to confirm information to be collected, stored, retrieved and archived
5. The methods you can use to collect required information
6. The procedures you should follow to access information systems
7. How to make sure information is accurate
8. The types of problems that occur with information systems and who to report them to
9. Why it is important to provide information in the required format and within agreed timescales
10. When information should be archived and the procedures to follow

Evidence requirements

This section is aimed at the assessor and sets out the evidence requirements for this unit.

1. Evidence for this unit is generated when your candidate is carrying out real work in a private sector organisation, not-for-profit organisation or public service organisation, whether full-time or part-time, paid or voluntary.
2. For this unit, evidence may be collected in an approved Realistic Working Environment or an extended work placement.
3. Simulation is not allowed for this unit.
4. Evidence must show that your candidate has consistently met the standard over a sufficient period of time for you to consider the candidate competent.
5. You may use the following assessment methods when assessing this unit:

Performance evidence	Observation	Yes
	Examination of work products	Yes
Supplementary evidence	Witness testimony	Optional
	Questions *	Yes

* This includes verbal and written questioning, questionnaires, work based tasks, reflective accounts, case studies, professional discussion and feedback reports.

6. Your candidate needs to show that they:

Process information. Evidence may include:

- File lists
- Updated computer or paper records
- Minutes of 1-1 meetings
- Team meeting minutes
- Task lists

Retrieve information. Evidence may include:

- File lists
- Retrieved computer or paper records
- Minutes of 1-1 meetings
- Team meeting minutes
- Evaluative statements
- Task lists

Archive information. Evidence may include:

- Indexed and/or catalogued computer or paper records
- Procedures, legal reasons for retaining information
- File lists
- Minutes of 1-1 meetings
- Team meeting minutes
- Task lists

7. Contingencies

Performance Indicator 8	If no problems arise during the assessment period 'what if' questions may be asked to confirm competence
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8. Evidence generated for this unit may contribute towards Unit 201:

- Communicate information
- Plan and be accountable for your work
- Improve your own performance
- Behave in a way that supports effective working

and Unit 202

- Work to achieve your organisation's purpose and values
- Support sustainability
- Support diversity
- Maintain security and confidentiality