



Excellect 209 (PTY) LTD Trading as

# NICORE

## Training and Development

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# GENERATE INFORMATION AND REPORTS FOR INTERNAL AND EXTERNAL USE

US 110000

NQF Level: 04

Credits: 10

## COURSE OVERVIEW





### PURPOSE OF THE UNIT STANDARD

This Unit Standard is intended for people working within Payroll Administration.

Persons credited with this Unit Standard are able to:

- Ascertain what information is required by internal and external clients/staff
- Process and distribute information to meet management requirements
- Communicate with individual employees and managers
- Provide information to authorised agencies
- Facilitate the transfer of funds to/from external bodies

### **Specific Outcomes and Assessment Criteria:**

#### **SPECIFIC OUTCOME 1**

Ascertain information requirements.

#### **ASSESSMENT CRITERIA**

1. All requests for information are authorised in accordance with the organisation's procedures.
2. All requests for information are verified for content and format.
3. Deadlines for the dispatch of information are identified to ensure compliance with requirements.
4. Requirements for the distribution of reports are agreed in advance with recipients.

#### **SPECIFIC OUTCOME 2**

Process and distribute information to meet management requirements.

#### **ASSESSMENT CRITERIA**

1. All data relevant to the report(s) is extracted and collated.
2. Information is produced in a format agreed with the recipient(s).
3. Information produced is accurate.
4. Reports are dispatched to meet agreed deadlines.
5. Reports are dispatched to agreed recipient(s) in accordance with the organisation's confidentiality procedures.
6. All information is produced in accordance with organisational procedures and standards.
7. Time scales and deadlines are complied with in terms of organisational and statutory requirements.

#### **SPECIFIC OUTCOME 3**

Communicate with individual employees and managers.

#### **ASSESSMENT CRITERIA**

1. The precise nature of each enquiry is ascertained before attempting a response
2. Enquiries are answered in accordance with the organisation's customer care requirements.
3. Enquiries outside of the jurisdiction or level of authority of the employee are referred to the appropriate person/department/external organisation
4. The content of answers to enquiries is accurate.
5. Confidentiality and security of information is maintained at all times.



6. All approaches for information and reports are authenticated according to organizational procedures and policy.

### **SPECIFIC OUTCOME 4**

Provide information to authorised agencies.

### **ASSESSMENT CRITERIA**

1. Enquiries are dealt with in accordance with the organisation's customer care requirements
2. All communications with external agencies are conducted in a professional manner
3. All information supplied is correct
4. Confidentiality and security of sensitive information is maintained at all times
5. Enquiries are responded to in the required format
6. Employee authorisation is obtained where required prior to the release of information
7. Information is supplied within the specified time scale
8. Copies of responses are retained and filed in accordance with the requirements of the organization
9. Information requested from other departments or individuals is followed up in an appropriate manner where necessary
10. The source of all enquiries is verified prior to the release of information

### **SPECIFIC OUTCOME 5**

Facilitate the transfer of funds to and from external bodies.

### **ASSESSMENT CRITERIA**

1. Payroll records are reconciled with the organisation's financial reports.
2. Payments are signed off by authorised personnel.
3. Payments are made in accordance with statutory deadline dates and are accompanied by the applicable statutory documentation
4. Payments made to non-statutory bodies are in accordance with organisational agreements.
5. All payments are made in accordance with organisational regulations and procedures