
Overview

This standard is about the effective maintenance and storage of information. This involves accurately recording information and storing it in the correct location.

Most workplaces use computers to store and maintain records but paper-based systems are still used.

Records could include those that are required by law and those that are maintained to aid the efficient running of the business. You will need to maintain any necessary confidentiality.

**Performance
criteria**

You must be able to:

- P1 Accurately locate the appropriate recording mechanism for the information you need to record
- P2 Where records do not currently exist, set them up, or work with the appropriate people to get them set up
- P3 Make entries into records that are accurate, complete and, in the case of written records, legible
- P4 Record information within required timescales
- P5 Store updated records accurately in the correct location
- P6 Follow procedures when records are transferred to another location
- P7 Maintain security and confidentiality of information recorded, in accordance with requirements
- P8 Take the appropriate action to resolve or report any errors or omissions that are discovered in the records, or any problems with maintaining, storing or retrieving records.

Knowledge and understanding

You need to know and understand:

- K1 The systems for record keeping and storage used within the organisation
- K2 The records which you are required to update and where they are located
- K3 The correct format in which records must be completed
- K4 When records should be completed
- K5 The limits of your responsibility for handling and using records
- K6 Your responsibility under relevant legislation
- K7 What the records are used for and the importance of accurate record keeping
- K8 Procedures for transferring records
- K9 Records that are confidential or commercially sensitive and how to deal with these
- K10 The types of problems that may occur with records, and how these should be resolved
- K11 The person to whom problems with records should be reported
- K12 How long records need to be kept.

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Maintain and store records within the workplace



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