

Use a filing system

Overview

This standard is about different filing systems and how to use them effectively. It is for staff that may work on a reception desk or within a reservations department. The storing and retrieval of information is key to ensuring all staff can access it quickly and easily which leads to customers' requests being met efficiently.

When you have completed this standard you will be able to demonstrate your understanding of and your ability to:

- Use a filing system

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Performance criteria

You must be able to:

Process information

1. Collect required information
2. Follow agreed procedures and legislation to maintain security and confidentiality
3. Store required information in approved locations to the required standard
4. Update information which is incomplete or out of date

Retrieve information

5. Confirm information for retrieval
6. Comply with procedures and legislation for accessing an information system
7. Locate and retrieve required information
8. Refer any problems with information systems to the appropriate colleague
9. Follow legal and organisational procedures and standards when deleting or destructing data

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Knowledge and understanding

You need to know and understand:

1. The purpose of storing and retrieving required information
2. The different information systems and their main features
3. Legal and organisational requirements covering the security and confidentiality of information
4. The purpose of confirming the information to be collected, stored and retrieved
5. The methods used to collect required information
6. The procedures to be followed to access information systems
7. The types of problems that occur with information systems and who to report them to
8. The reasons why data needs to be destructed following legal and organisational procedures and standards

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