

ICB

ACCREDITED BUSINESS
QUALIFICATIONS

OFFICE AND LEGAL PRACTICE (OLPR)

CURRICULUM STATEMENT

CURRICULUM STATEMENT: ICB OFFICE & LEGAL PRACTICE

The role and function of the administrative assistant

- emonstrate an understanding of the role and the function of a secretary in an organisation;
- indicate the traditional technical skills required by secretaries;
- identify additional skills which are likely required;
- advise a junior employee on performance;
- appreciate the importance of good telephone etiquette;
- demonstrate competence as a secretary in an organisation;
- demonstrate competence in handling routine business correspondence;
- draft memoranda, minutes and reports; and
- demonstrate skills and ability to organise.

Reception and diary management

- Acknowledge and greet visitors according to organisational requirements;
- establish rapport with visitors;
- maintain a professional appearance and behaviour at all times;
- consult visitors in a professional manner and establish the reason for their visit;
- attend to requests for information promptly;
- estimate the time or waiting period and convey this information to the client;
- record the receipt and dispatch of documents and deliveries in accordance with organisational requirements;
- notify relevant parties of visitors' arrival;
- give clear directions to visitors to relevant areas in the workplace;
- explain and apply security procedures;
- list and explain housekeeping according to organisational requirements;
- implement housekeeping standards within agreed time frames;
- ensure that reception services are not disrupted while housekeeping activities are performed;
- coordinate corporate image displays to create a presentable reception area;
- keep the display area neat, tidy and clean at all times;
- constantly maintain stocks of company brochures and magazines for distribution;
- maintain a well-organised diary with appointments;
- outline the most important rules of office etiquette;
- and outline the steps to be taken during an armed robbery or another emergency situation.

Office equipment and ergonomics

- Outline the features of the different kinds of office equipment;
- work with office equipment;
- choose the correct office equipment to suit your needs;
- gauge whether renting or buying is a better bet;
- control the movement of different items of inventory;
- implement preventative maintenance strategies;
- implement predictive maintenance strategies; and
- implement safety measures with respect to office equipment and machinery.

Office supplies

- Monitor office supplies levels by
  - Identifying and recording office supplies levels
  - Ascertaining and comparing office supply levels to equired levels
  - Checking records for compliance with organisational requirements.
  - Taking remedial action to rectify office supply levels.
- Maintain office supplies processes and procedures
  - Monitoring and evaluating office supply processes and procedures
  - Identifying and highlighting out-of-line situations
  - Taking remedial action to bring office supply processes and procedures back in line
  - Identifying areas for improvement
- Monitor and control the distribution of office supplies by
  - Identifying, setting and communicating distribution procedures
  - Receiving and recording office supply requests
  - Distributing office supplies within agreed timeframes.
  - Identifying and highlighting areas of non-conformance
  - Taking remedial action to rectify office supply distribution processes and procedures

Creating evidence and maintaining confidentiality

- Explain the purpose of record-keeping;
- identify types of information and records;
- describe various methods of record keeping;
- explain procedures for maintaining confidentiality;
- identify the legal requirements for record keeping;
- follow organisational procedures; and
- understand the concept of whistle-blowing.

Record management systems

- Provide reasons why companies record and keep information;
- identify the structure, components, equipment and supplies required for electronic and paper filing systems;
- use procedures appropriate to the workplace for opening, closing and retaining files;
- select and use appropriate storage and retrieval methods for electronic and paper records;
- handle records in a manner which complies with statutes and regulations governing the privacy of information and the retention of records;
- develop a schedule for retention and disposal of records; provide reasons for internal control; and
- identify problems with inadequate internal controls and make suggestions for improvement.

Handling mail

- Receive mail according to established procedures;
- sort mail according to established procedures;
- stamp mail correctly according to established requirements;
- provide reasons for stamping incoming mail;
- attach enclosures securely and report missing items in accordance to set procedures;
- describe the importance of maintaining confidentiality and security of documentation in terms of receiving and sorting mail;
- observe confidentiality in terms of a mailroom code of conduct;
- distribute mail internally to relevant persons within an agreed time;
- explain possible reasons for unavoidable or necessary delays in distribution, and describe the consequences of such delays;
- address mail legibly and correctly for internal and external distribution;
- describe procedures for dispatching mail externally in accordance with established procedures and Post Office requirements;
- dispatch mail externally via the Post Office or a courier service within agreed deadlines; and
- explain the legal implications of neglecting to comply with mailroom procedures in terms of own work performance and possible cost to company.

Travel and events management

- Identify the principal features of making effective travel arrangements;
- prepare an itinerary for a trip;
- give advice on booking travel and hotel accommodation;
- suggest a selection of useful travel reference sources which a secretary might consult;
- list the sort of arrangements entailed in organising formal and informal meetings;
- appreciate the factors which need to be taken into account in arranging a business lunch or event;
- suggest the factors which would contribute to a successful social event;
- identify the principal features in organising a business event;
- explain the kind of checks which would be built into arrangements to ensure effectiveness; and
- identify and source available external support.

Creating business documents

- Produce an advanced business letter;
- produce an advanced official letter/formal report;
- produce display documents and documents used at meetings, suitable for publishing on A4 and A5 paper;
- prepare a notice, agenda and minutes of a meeting;
- prepare a table on A4 portrait and A4 landscape paper;
- preparing a legal document and a company document;
- producing a financial statement; and preparing a curriculum vitae and a memorandum.

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Banking, cash control and the business information manual

- Discuss the necessity of banking and banking accounts with examples of consequences of not having them;
- explain the skills necessary to interpret bank statements and operate banking accounts with examples;
- relate financial concepts and principles to the business environment; and
- prepare a business information manual (business plan).

An introduction to business law

- Describe the South African legal system;
- identify the different courts of law;
- discuss the requirements that have to be met in order for a contract to be valid; and
- distinguish between the different types of contracts a person can enter into.

Acts and laws for business

- Discuss aspects of intellectual property law;
- discuss aspects of competition law;
- discuss legislation applicable to business and banks; and
- discuss legislation applicable to the accounting and tax environments.