SS32 Record, store and supply information using a paper-based filing system

OVERVIEW

This standard is about using a paper-based filing system to update files and supply information to other people. You are to record and store information in the correct place, creating new files when necessary. You must also find information requested by others and pass it to them in an appropriate format. You are expected to treat confidential information correctly and to report any problems that arise.Users of this standard will need to ensure that practice reflects up to date information and policies.Version No 1

KNOWLEDGE AND UNDERSTANDING

You will need to know and understand:

1. the basic requirements of data protection and other relevant legislation
2. the procedures for getting access to the filing system and who is allowed to use it
3. why it is important for your organisation to have an effective and efficient filing system and what would happen if it did not
4. alphabetical, numerical, chronological and alphanumeric filing systems and how to use them
5. how to use indexes
6. why it is important not to lose or damage files and their contents and how to keep them safe
7. why it is important to find and return files and their contents and how to keep them safe
8. types of confidential information and how to deal with these correctly
9. why it is important to note the fact that you have put information into the system and how to do so
10. the procedures for cross-referencing
11. the procedures for opening new files
12. why it is important to note the fact that you have removed files and how to do so
13. the correct procedures for reporting and finding missing items and why it is important to follow these
14. problems that may occur with stored information and how to improve the system
15. alternatives you might suggest if it is not possible to find information that matches what was requested

PERFORMANCE CRITERIA

You must be able to do the following:

1. record the information accurately
2. keep the information safe and intact
3. store the information in the correct place using established procedures
4. create new files when required
5. store the information within the agreed timescales
6. update records to show that the information has been stored
7. identify and report any problems with the system or opportunities to improve it
8. treat any confidential information correctly
9. find the information that you were asked for using established procedures
10. if necessary, clearly and accurately note the fact that the information has been removed and who has taken it
11. identify any file problems and follow the correct procedures for reporting them
12. keep the file and its contents safe and intact
13. pass the information on to the person who asked for it on time and in the format requested
14. suggest alternatives if the information does not match their requirements
15. treat any confidential information correctly

ADDITIONAL INFORMATION

This standard was developed by the Council for Administration as Unit 205. This standard links with the following dimension within the NHS Knowledge and Skills Framework (October 2004): Dimension: IK1 Information Processing