



APPLICATION FOR ASSESSMENT BY RECOGNITION OF PRIOR LEARNING (RPL)

RTO and national provider #	Bookkeeping Institute of Australia Pty. Ltd ASSESSOR: Marian Brown	32190
AQTF Qualification	Certificate IV in Financial Services (Bookkeeping)	FNS40207
Applicant and student number		
Date of Application	/ /	

RECOGNITION OF PRIOR LEARNING (RPL) ASSESSMENT PROCESS

Introduction

Recognition of prior learning (RPL) may be defined in a number of ways, some more expansive than others. However, all definitions include the key notion that RPL involves the assessment of previously unrecognised skills and knowledge an individual has achieved outside the formal education and training system. RPL assesses this unrecognised learning against the requirements of a qualification, in respect of both entry requirements and outcomes to be achieved. By removing the need for duplication of learning, RPL encourages an individual to continue upgrading their skills and knowledge through structured education and training towards formal qualifications and improved employment outcomes.

Definition

RPL is an assessment process that assesses the *individual's* non-formal and informal learning to determine the extent to which that individual has achieved the required learning outcomes, competency outcomes, or standards for entry to, and/or partial or total completion of, a qualification.

RPL assessment processes

In order to recognise prior learning it is necessary to:

- Compare the informal or non-formal learning the individual has achieved against the learning outcomes or performance criteria of the course or qualification for which the student is using as a basis for seeking entry or the award of credit, and
- Determine appropriate evidence to support the claim of prior learning.

The processes used to assess RPL applications may take the following forms, which are not mutually exclusive:

1. Participation in exactly the same or modified versions of the assessment unit (i.e. recognition of a current competency);
2. Assessment based on a portfolio of evidence;
3. Direct observation of demonstration of skill or competence;
4. Reflective papers, journals or portfolios that relate past learning to the learning or competency outcomes of the current course or qualification;
5. Provision of examples of the student's work drawn from the workplace, social, community or other setting in which the student applies their learning, skill or competence;
6. Testimonials of learning, skill or competence; and combinations of any of the above.

(source: <http://www.aqf.edu.au/rplnatprin.htm>)

Please type your full name and student number (if known) here

RPL Application Form

RPL Application Form				
Personal Contract Details	Name			
	Preferred name and title	<input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Dr		
	Physical home address			
	City, State and post code			
	PO Box, City, State and post code			
	Home, work, fax and Mobile phone numbers			
	Age, gender and date of birth	<input type="checkbox"/> Male <input type="checkbox"/> Female	/	/
	Country of origin and are you a permanent resident of Australia?	<input type="checkbox"/> Yes <input type="checkbox"/> No		
	Email address			
Employer Details	Employment situation	<input type="checkbox"/> Employed <input type="checkbox"/> Looking for Employment <input type="checkbox"/> Contract Bookkeeper <input type="checkbox"/> Business Owner <input type="checkbox"/> Student <input type="checkbox"/> Other—please specify		
	Current employer			
	Address			
	ABN if self-employed			
	Industry			
	Position held and length of employment			
	Previous positions held			
	Name, position and phone number of person you report to			
	Name, position and phone number of a colleague who can vouch for your competency			
Previous employment	Please attach a detailed CV in 'Word' format including job descriptions, skills and contact names and phone numbers of previous managers and colleagues who can vouch for your competency			
Education Details	In which year did you finish secondary school in?	<input type="checkbox"/> Year 12 <input type="checkbox"/> Year 11 <input type="checkbox"/> Other—please specify		
	Name and city of last school you attended			
	Qualifications or Course of Study	Institute or University	Year started	Year finished
Please ensure that you attach certified copies of all qualifications and certificates specified above				

Please type your full name and student number (if known) here

RPL Application Form (cont.)

	Organisation	Year joined	post nominal letters
Professional Memberships			
Please ensure that you attach <u>certified</u> copies of all qualifications and certificates specified above			
Professional Reference 1	Name		
	Position		
	Organisation		
	City, State and post code		
	Work, fax and Mobile phone numbers		
	Email address		
	Relevance to your work situation		
Professional Reference 2	Name		
	Position		
	Organisation		
	City, State and post code		
	Work, fax and Mobile phone numbers		
	Email address		
	Relevance to your work situation		
Professional Reference 3	Name		
	Position		
	Organisation		
	City, State and post code		
	Work, fax and Mobile phone numbers		
	Email address		
	Relevance to your work situation		
Documents Attached <small>(certificates, awards, photos, resume, etc.)</small>	Document	Significance	

Please type your full name and student number (if known) here

APPLICATION FOR ASSESSMENT BY RECOGNITION OF PRIOR LEARNING (RPL) DECLARATION OF APPLICANT

I declare that the information contained in this application is true and correct and that all documents are genuine. I give my permission for any staff member of BIA or their assessment partners to contact any of the named references in this application for the purpose of confirming the accuracy of my statements and to discuss my competency in this assessment.

Name of Applicant	Signature
Date:	/ /
Name of Witness (not a relation)	Signature
Date:	/ /
Relationship of witness to applicant:	
Phone number of witness:	

Introduction

The Certificate IV in Financial Services (Bookkeeping) is a qualification that is recognised by the Financial Services industry to cover various roles within this field. Working in the Financial Services industry is extremely rewarding with many opportunities in various positions within an organisation. These may include a bookkeeper, small business consultant, payroll officer, accounts payable/receivable officer or an office administration manager. These roles have many responsibilities and are considered important within the organisational network. They form part of a team to ensure the successful running of a business.

The Certificate IV in Financial Services (Bookkeeping) is made of 4 compulsory core units, 5 compulsory sectoral core units and 2 electives, all of which must be completed - a total of 13 units of competency.

To gain competency in the compulsory units of the certificate you need to be able to demonstrate that you currently:

- Have a sound working knowledge of relevant legislation and codes of practice for the Financial Services industry to ensure compliance;
- Understand and can implement Occupational Health and Safety procedures;
- Can communicate effectively and efficiently to a variety of audiences;
- Have a sound knowledge of organisational and industry policy and procedures;
- Have the ability to read data and input accurately;
- Can operate an accounting system to process (a) BAS requirements; (b) financial reports; (c) asset and inventory transactions; and (d) payroll

Tips and hints to help you prepare for recognition

To have your skills formally recognised in the national system, assessors must make sure you have the skills and knowledge to meet the industry standard. This means you must be involved in a careful and comprehensive process that covers the content of all unit/s or qualification/s you can be recognised for.

Assessment happens in a variety of ways. Being prepared can save you valuable time and hassle and make the recognition process stress-free for you.

Here are some tips and hints for you:

1. At your interview be prepared to talk about your job roles and your work history.
2. Submit with your resume the following: your position description and any performance appraisals you have from any finance industry offices or facilities you have worked in.
3. Consider the possibilities for workplace contact. Are you in a workplace that is supporting your goal to get qualified? Would you feel comfortable to have the assessor contact your workplace or previous workplaces so your skills can be validated?
4. Think about who can confirm your skill level. Think about current or recent supervisors who have seen you work in the past 18 months and will be able to confirm your skills. The assessor will need to contact them. You may also have community contacts or even clients themselves who can vouch for your skill level.
5. Submit with your resume the following: any certificates from in-house training or formal training you have done in the past.
6. You can speak with Marian about other ways you can show your skills in the financial services industry. These could be letters from employers, records of your professional development sessions, employers or clients in related industries or government agencies, acknowledgements, workplace forms (as long as they don't show client details) or other relevant documents.

STEPS IN THE RPL PROCESS

Step 1 – Provide information of your skills and experience

Complete the form and provide as much information of your previous experience in the financial services and bookkeeping industries as you can. This is your first opportunity (but not the last) to provide proof of your variety of experience in the industry. Here you can supply examples of your work history which could include:

General employment documents [please supply with this application]

- detailed CV or work history
- position descriptions
- certificates/results of assessment
- details of in house courses, workshops, seminars, orientation or induction sessions
- references/letters from previous employers/supervisors

Workplace documents (NB: please block out any confidential client information - have available for interview only)

- task sheets / job sheets
- documents you have produced that show you can use software eg. letters, memos, spreadsheets
- copies of equipment maintenance registers you have completed (eg. organising printer repairs and service, equipment log books)
- financial reports and period-end financial statements you have prepared
- taxation documents and reconciliations you have completed
- working papers for operational budgets you have prepared
- asset and inventory records you have maintained
- file notes or memos showing where you have provided advice in a legal context
- any other documentation that may demonstrate industry experience

Depending on the industry you have worked in, you may or may not have documentary evidence available. This should not deter you from seeking RPL as the Assessor will work with you during the RPL process.

You will also need to supply contact details of two work referees who can confirm your skills in the industry.

Step 2 – Conversation with Assessor

An assessor will review the information you have provided and begin to match up your skills to the units/subjects in the qualification. At this point, you will have the opportunity to discuss and identify your previous experience with the assessor who will understand your industry experience and conduct a competency conversation with you.

If your assessor is not able to visit you, this conversation will take place over the telephone.

Step 3 – Practical demonstration of your skills

If appropriate and possible the assessor will conduct a practical skills test at your workplace or at another suitable venue. This, again, is an opportunity to demonstrate your level of competence. This assessment will be focussed on skills that are required in the qualification. Your assessor will identify the skills that he/she will want you to demonstrate.

Further steps

After you have completed the above steps, your assessor will give you information about the skills that have been recognised and whether you have gained the full qualification. If you do have skill gaps, these may be addressed through flexible training and specific assessments. Some assessments may be necessary to provide evidence of your current competencies.