

**EASTERN ARIZONA COLLEGE**  
**Office Procedures/Records Management**

**Course Design**  
**2018-2019**

**Course Information**

**Division** Business  
**Course Number** AIS 213A  
**Title** Office Procedures/Records Management  
**Credits** 1  
**Developed by** Dana Barnett  
**Lecture/Lab Ratio** 1 Lecture/0 Lab

**Transfer Status**

ASU	NAU	UA
Non Transferable	Elective Credit	Non Transferable

**Activity Course** No  
**CIP Code** 52.0400  
**Assessment Mode** Pre/Post Test (34 Questions/50 Points)  
**Semester Taught** Fall  
**GE Category** None  
**Separate Lab** No  
**Awareness Course** No  
**Intensive Writing Course** No  
**Diversity and Inclusion Course** No

**Prerequisites**

None

**Educational Value**

Develops skills in basic filing methods and procedures needed to ensure the effectiveness of records systems. Enhances employability by developing and refining filing procedures which are in high demand by business.

**Description**

One of the three office procedures modules designed to give the student real-world, hands-on experience while developing knowledge and skills necessary for work in the business office. In this module, students will learn the basic principles and procedures of managing business records and documents using alphabetic, geographic, subject, chronological, and numeric filing systems. Covers the records management process from creation to disposition.

**Supplies**

None

## **Competencies and Performance Standards**

### **1. Utilize alphabetic indexing rules in card filing procedures.**

#### **Learning objectives**

*What you will learn as you master the competency:*

- a. Follow alphabetic indexing rules.
- b. Complete alphabetic card filing jobs

#### **Performance Standards**

*Competence will be demonstrated:*

- o in the completion of job assignments
- o in the completion of finding tests

*Criteria - Performance will be satisfactory when:*

- o learner follows alphabetic indexing rules
- o learner arranges information in correct alphabetic order

### **2. Prepare and arrange cross-references for personal and business names.**

#### **Learning objectives**

*What you will learn as you master the competency:*

- a. Recognize when to use a cross-reference notation.
- b. Complete a cross-reference notation

#### **Performance Standards**

*Competence will be demonstrated:*

- o in the completion of job assignments
- o in the completion of finding tests

*Criteria - Performance will be satisfactory when:*

- o learner identifies method of cross-referencing
- o learner utilizes proper cross referencing notation

### **3. Apply alphabetic filing procedures to incoming and outgoing correspondence.**

#### **Learning objectives**

*What you will learn as you master the competency:*

- a. Complete filing procedures for incoming and outgoing correspondence.

#### **Performance Standards**

*Competence will be demonstrated:*

- o in the completion of job assignments
- o in the completion of finding test

*Criteria - Performance will be satisfactory when:*

- o learner organizes incoming and outgoing correspondence for filing

**4. Use a tickler file system.**

**Learning objectives**

*What you will learn as you master the competency:*

- a. Complete filing procedures involving the use of a tickler file.

**Performance Standards**

*Competence will be demonstrated:*

- o in the completion of job assignment
- o in the completion of finding test

*Criteria - Performance will be satisfactory when:*

- o learner utilizes the tickler file system

**5. Utilize requisition and charge-out procedures.**

**Learning objectives**

*What you will learn as you master the competency:*

- a. Demonstrate the use of a requisition and charge-out forms.

**Performance Standards**

*Competence will be demonstrated:*

- o in the completion of job assignment
- o in the completion of finding test

*Criteria - Performance will be satisfactory when:*

- o learner completes requisition and charge-out procedures

**6. Apply subject correspondence filing rules.**

**Learning objectives**

*What you will learn as you master the competency:*

- a. Complete subject correspondence filing job.

**Performance Standards**

*Competence will be demonstrated:*

- o in the completion of job assignment
- o in the completion of finding test

*Criteria - Performance will be satisfactory when:*

- o learner utilizes rules for subject filing

**7. Apply consecutive numeric and terminal-digit card and correspondence filing rules.**

**Learning objectives**

*What you will learn as you master the competency:*

- a. Complete consecutive numeric filing job.
- b. Complete terminal-digit filing job.

**Performance Standards**

*Competence will be demonstrated:*

- o in the completion of job assignment

- o in the completion of finding test
- Criteria - Performance will be satisfactory when:*
- o learner utilizes rules for terminal-digit numeric filing
  - o learner utilizes rules for consecutive numeric filing

**8. Apply geographic card filing rules.**

***Learning objectives***

*What you will learn as you master the competency:*

- a. Complete geographic card filing job.

***Performance Standards***

*Competence will be demonstrated:*

- o in the completion of job assignment
- o in the completion of finding test

*Criteria - Performance will be satisfactory when:*

- o learner utilizes geographic card filing rules

**9. Utilize electronic filing procedures.**

***Learning objectives***

*What you will learn as you master the competency:*

- a. Use the sort feature to sorts by key unit, 2nd, 3rd and 4th units.
- b. Compare computer printout with manual card filing.
- c. Create table of Accession Log.
- d. Sort Accession Log.
- e. Print sorted material and Accession Log.

***Performance Standards***

*Competence will be demonstrated:*

- o in the completion of computer filing job assignment

*Criteria - Performance will be satisfactory when:*

- o learner uses the sort feature to sort by key unit, 2nd, 3rd and 4th units
- o learner compares computer printout with manual card filing
- o learner creates table of Accession Log
- o learner sorts Accession Log
- o learner prints sorted material and Accession Log

***Types of Instruction***

Classroom Presentation

Simulated Work Experience

**Grading Information**

**Grading Rationale**

Report Sheets--300 pts (60%)

Finding Tests--150 pts (30%)

Posttest--50 pts (10%)

Total Points Possible = 500 pts

**Grading Scale**

A 90%-100%

B 80%-89%

C 70%-79%

D 60%-69%

F Below 60%