COURSE OUTLINE

Computer Applications and Business Office Technologies 104 Filing Methods and Systems

I. **Catalog Statement**

Computer Applications and Business Office Technologies 104 covers principles and procedures for establishment and use of various filing systems. This includes practice in alphabetic, numeric, geographic, and subject filing methods and covers principles and procedures for storage and retrieval, retention, and transfer and disposal of records.

Units—1.0

Lecture hours—3.0 (8 weeks)

Recommended preparation: Eligibility for Computer Applications & Business Office Technologies 102 or English 120

II. **Course Entry Expectation**

Prior to enrolling in the course, the student should be able to:

- read and understand textbook information and instructions: 1.
- 2. comprehend information and instructions presented in class lectures and demonstrations.

III. **Course Exit Standards**

Upon successful completion of the required coursework the student will be able to:

- 1. comprehend principles for alphabetic, numeric, geographic and subject filing.
- 2. understand procedures for storage, retrieval, retention, transfer of records.

IV.

Total Contact Hours = 24

Course Content 4 hours A. Introduction to Records Management 1. Nature of records management 2. History of business records 3. Filing terminology - Manual and Electronic Basic Methods of Filing Correspondence В. 10 hours 1. Alphabetic 2. Numeric 3. Geographic 4. Subject 5. Chronological **Storage Procedures** C. 3 hours Basic filing supplies 1. Filing procedures 2. Inspecting a. Indexing b. Coding

f. D. Retrieval Procedures

c. d.

Cross-referencing

Filing (storing)

Sorting

1 hour

- 1. Requisitions and charge-outs
- 2. Follow-up procedures
- E. Methods and Systems for Storage and Retrieval of Special Records 2 hours
 - 1. Cards and visible records
 - 2. Non-correspondence records
 - 3. Unconventional records
- F. Control of the Records Cycle

3 hours

- 1. Creation
- 2. Retention
- 3. Transfer
- 4. Disposal
- G. Filing Supplies, Software, and Equipment

1 hour

V. Methods of Presentation

The following instructional methodologies may be used in the course:

- 1. lecture/demonstration;
- 2. hands-on activities and exercises.

VI. Assignments and Method of Evaluation

- 1. In class assignments (e.g. practice filing tasks—electronic and manual—specific to medical, legal, and general business offices).
- 2. Computer projects (e.g. electronically filing patient or client information).
- 3. Ouizzes.
- 4. Final examination.

VII. <u>Textbook</u>

Stewart, Gregg Quick Filing Practice Box Set, Stewart, 5th ed.

New York: Glencoe/MH Publishing, 2005.

10th Grade Textbook Reading Level. ISBN: 0-07-322288-7.

VIII. Student Learning Outcomes

Upon successful completion, the student will be able to:

- 1. apply principles of alphabetic, numeric, geographic, and subject filing with minimum 70 percent; accuracy.
- 2. store, retrieve, retain, transfer, and dispose of records with minimum 70 percent accuracy.