

# Office Technology 44 FILING PROCEDURES

Quarter 1, Fall 2019

M-Th 12-12:50 in CTL-1

#55066: 08/12-10/11/2019

Mrs. Pam Gilmore

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## OFFICE HOURS in CCI-211:

Office Hours: Monday-Friday, 9-10 a.m. or by appointment any other time.

CENSUS DATE: 8/21/19

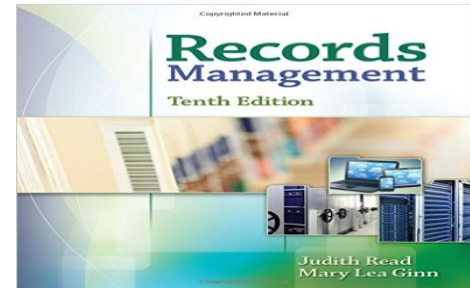
DROP DATE: 9/11/19

## COURSE DESCRIPTION:

This course is an introduction to basic rules of filing in alphabetic, numeric, subject, and geographical filing systems. Students will learn about the equipment and supplies needed, retention, retrieval, and the transfer phases of the record life cycle. Electronic records management will also be practiced.

## REQUIRED TEXT and SUPPLIES:

- USB Drive
- Records Management Simulation (Set Only-Student Instruction Manual/Cd /Tabs/Labels); Author : Read; Publisher Southwestern; Edition 10 (\$132.75)



This simulation kit is required. If it is not acquired by the end of the second week of instruction, the student will be dropped from the course.

## OUTCOMES:

Upon completion of this course, students should be able to:

1. use basic terminology of records storage, equipment and supplies, and methods of storage.
2. apply the principles and procedures of the alphabetic, numeric, subject, and geographic methods of filing according to American Records Management Association (ARMA) rules.
3. properly code and index names of individuals, business organizations, governmental agencies, and other names.
4. apply the principles and procedures of electronic records management at the file clerk level of competency.

## OBJECTIVES:

In the process of completing this course, students will:

- Recall basic filing and records management terms, fundamental uses of filing equipment and supplies, and methods of storage.
- Practice identifying records, coding records, and filing records within an alphabetic, numerical, subject, or geographic records management system.
- Manage records electronically using computer software including file management software.

## COURSE OUTLINE:

- Introduction to Filing
- How records are classified and used in an office
- Relevant legislation
- Possible careers
- Basic terminology
- Alphabetic Indexing
- Rules for personal and business names, organizations and institutions, and governmental names
- Cross-references
- Subject categories used within an alphabetic arrangement
- Equipment and Supplies
- Types of storage equipment
- Methods of storage
- Folders, guides, labels
- Security
- Subject Records Storage
- When subject records storage method is needed
- Dictionary and encyclopedic subject file arrangements
- Four indexes used
- Supplies needed
- Numeric Method
- Basic components
- Conversion process from alphabetic to numeric
- Consecutive and nonconsecutive storage methods
- Records stored chronologically
- Geographic Records Storage
- Reasons for use
- Indexing and coding for geographic method
- Cross-referencing
- Electronic Records Management
- Electronic records lifecycle
- Classification of electronic records
- Retention and maintenance
- Disposition
- Electronic databases

## ATTENDANCE:

Just as it is expected that employees will be present for all workdays, students are expected to attend all class meetings, be on time, and be in class the entire class session. The only excused absences are those due to a school-related activity or a requirement to appear in court. Calling me to tell me you will be absent does not excuse you but is considered a professional courtesy and will be noted in your attendance record. Students leaving class before the end of class will be recorded as absent. Your classmates and I would greatly appreciate that students in the class take care of any personal needs (i.e., using the restroom, getting a drink, sharpening a pencil) before class begins. If you decide to drop the course, it is your responsibility to make the drop official in the Admissions and Records office or else possibly receive a grade of F.

STUDENTS WILL BE DROPPED FROM THIS COURSE ON THE 3RD CONSECUTIVE ABSENCE OR ON THE 4TH NON-CONSECUTIVE ABSENCE PRIOR TO THE DROP DEADLINE.

## TARDIES:

Students are expected to be on time. It is distracting, rude and unfair to fellow classmates and to the instructor when a student is late. Two tardies result in a loss of one participation point.

## HOLIDAYS:

- Labor Day, Monday, September 2

## PARTICIPATION:

Students are required to participate in all class discussions and activities. Participation points are earned in this class. You may not start the homework during class or work on lab assignments during lecture. You

may not study for another class, sleep, surf the Internet, or read a book during class. Cell phones must be put out of site and set to silent mode. (See POP quiz note.) Social networking apps on the desktop computers must be turned off during class, not simply minimized. Headphones/ear buds are not to be used during lecture or exams.

ASSIGNMENTS:

Assignments are due at the beginning of the next class session unless otherwise announced. Assignments must be neatly hand-written. If the assignment requires more than one page, staple the pages in order at the upper left-hand corner. Keep all assignments neat and orderly. No torn, wrinkled, or soiled assignments will be accepted. If you need another copy of the assignment because your handout has been damaged, you may print one from Canvas. No late assignments will be accepted. Note: Being absent the day assignments are due does not entitle you to turn it in late! Telephone or email me to discuss your specific situation.

QUIZZES:

Quizzes may be announced. There are no makeups for missed quizzes. NO EXCEPTIONS! POP quizzes will be given each time a cell phone is activated or a text message is sent or received during class. Cell phones must be out of sight during class. If a cell phone is observed out on your desk or in your lap, a pop quiz will be administered to the entire class.

TESTS:

There are no makeups for missed tests. If you foresee that you have an unavoidable situation on an upcoming test date, you may arrange to take the test early. No late tests will be allowed. As expected by your employer, you must telephone me to discuss a specific situation. Unlike your employer, I do accept and encourage email notifications since I am rarely in my office to receive your phone calls.

FINAL EXAM:

A two-hour comprehensive final exam will be given at the end of the quarter. The dates and times of the two-part exam are as follows: Wednesday, March 13 and Thursday, March 14, 12-12:50.

GRADING:

QUIZZES & CLASS PARTICIPATION: 10%  
ASSIGNMENTS: 30%  
TESTS: 60%

Percent of Total Points	Grade
90-100	A
80-89	B
70-79	C
60-69	D
0-59	F

Study Groups:

I highly recommend that you connect with the other students in the class and form a study group. Trade phone numbers, share study loads, and help one another WITHOUT doing the work FOR others. Study groups always help a person do better. The library has private rooms which can be reserved for study groups.

### Tutoring Center:

Sign UP in the Tutoring Center (in the Library).

### Instructor Help:

If you find yourself falling behind or needing help, talk to me!!! Ignoring a situation won't make it go away. The sooner you talk to me, the more likely it is that you will succeed. I have a brand-new office! Come see me!

### Time Management:

In order to be successful in a 2-unit class, it is expected that the student will be engaged in the classroom 4 hours per week and working/studying for the class at least 8-12 hours per week outside of classroom for 9 weeks. Successful students will schedule their study/homework time exactly like they schedule their class and work schedules. Successful students never say, "I will study sometime this week." They know exactly WHEN they will be studying for each and every class.

### ADA

If you have special needs as addressed by the Americans with Disabilities (ADA) act including alternate media requests, please notify your course instructor immediately. Reasonable efforts will be made to accommodate your special needs.

### Academic Dishonesty

Students at Reedley College are entitled to the best education that the college can make available to them, and they, their instructors, and their fellow students share the responsibility to ensure that this education is honestly attained. Because cheating, plagiarism, and collusion in dishonest activities erode the integrity of the college, each student is expected to exert an entirely honest effort in all academic endeavors. Academic dishonesty in any form is a very serious offense and will incur serious consequences.

**Cheating** is the act or attempted act of taking an examination or performing an assigned, evaluated task in a fraudulent or deceptive manner, such as having improper access to answers, in an attempt to gain an unearned academic advantage. Cheating may include, but is not limited to, copying from another's work, supplying one's work to another, giving or receiving copies of examinations without an instructor's permission, using or displaying notes or devices inappropriate to the conditions of the examination, allowing someone other than the officially enrolled student to represent the student, or failing to disclose research results completely.

**Plagiarism** is a specific form of cheating: the use of another's words or ideas without identifying them as such or giving credit to the source. Plagiarism may include, but is not limited to, failing to provide complete citations and references for all work that draws on the ideas, words, or work of others, failing to identify the contributors to work done in collaboration, submitting duplicate work to be evaluated in different courses without the knowledge and consent of the instructors involved, or failing to observe computer security systems and software copyrights.

Incidents of cheating and plagiarism may result in any of a variety of sanctions and penalties, which may range from a failing grade on a particular examination, paper, project, or assignment in question to a failing grade in the course, at the discretion of the instructor and depending on the severity and frequency of the incidents.