



FUNDAMENTAL WORD PROCESSING SKILLS (205)

Regional — 2014

Production	Points
Job 1 Memorandum	_____ (100 points)
Job 2 Table	_____ (100 points)
Job 3 Report	_____ (100 points)
Job 4 Agenda	_____ (100 points)
<i>TOTAL POINTS</i>	_____ (<i>400 points</i>)

**Judges/Graders: Please double check and verify all
scores and answer keys!**

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JOB 1—Memorandum

**1" Top Margin
1" Side Margins**

MEMORANDUM (16 PT)

(DS)

TO: Edna Renick, Administrative Support Department Manager

(DS)

FROM: Julie Smith, Human Resources Department Manager

(DS)

DATE: Current Date

(DS)

SUBJECT: Records Management and Retention Policies

(DS)

We recently hired 10 new employees. These employees have been placed in entry-level positions across our various departments.

I would like you to prepare a training module that covers our policies and procedures regarding records management and retention periods for specific documents/electronic files. The training should include the types of media on which information is kept, the phases of the record life cycle, and the process for the removal and archiving of records.

In addition to presenting this to our new employees, all existing administrative support personnel will be required to review the material. This training should be conducted within the next 60 days. Thank you.

(DS)

xx



JOB 2—Table

**RETENTION PERIODS
(QS)**

Category	Active Storage	Inactive Storage
Bank reconciliations	3 years	Permanent
Bids and related correspondence	1 year	4 years
Client database	Permanent	
Correspondence	1 year	4 years
Financial statements (balance sheets and income statements)	3 years	Permanent
Invoices	2 years	7 years
Presentations	1 year	2 years

Contestant Number

Job #



JOB 3—Report

Renick 1

Edna Renick

Administrative Support Personnel

All Departments

(Current Date)

Overview of a Records Management System

The main purpose of a records management system is to make sure records are available when needed so that the organization can operate efficiently. Such a system fulfills this purpose in several ways by:

- Using storage media
- Providing proper storage equipment and supplies
- Outlining procedures for filing
- Developing an efficient retrieval procedure
- Setting up a schedule for when records should be kept or discarded

An effective records management system benefits the organization in two ways. First, workers are more productive. Second, customer goodwill is maintained.

To make an intelligent decision or complete a task well, you need accurate, current information. For example, to prepare a monthly sales report, you need to have the sales figures for each sales representative. Before you pay an invoice, you should check your records to be sure the charges are correct. Before you can mail a package, you need to know the recipient's complete address.

Contestant Number

Job #



Renick 2

You must be able to access needed records easily and quickly. An effective records management system will enable you to be more productive because you will not waste valuable time searching for information that should be easily available.

Customers and business associates may not fully appreciate efficient records management in your organization, even though they like the results of such management. They are pleased when you retrieve pertinent information quickly. Yet, they may take the smooth operation of the records management system for granted.



JOB 4—Agenda (1” Top and Side Margins)

PROFESSIONAL BUSINESS ASSOCIATES

(DS)

Agenda

(DS)

Training Session for Administrative Support Personnel

(DS)

Tuesday, March 10, 2014 – 9:00 a.m.

(DS)

Records Room

(QS)

1. Welcome—Edna Renick, Administrative Support Department Manager
(DS)
2. Objects and Topics—Kathryn Johnson, Administrative Assistant
Types of Storage Media—Mary Flynn
Filing Procedures—Deb Storms **(SS)**
Record Life Cycle—Jack Welch
(DS)
3. Importance of Proper Records Keeping—Department Managers
(DS)
4. Evaluation—Kathryn Johnson, Administrative Assistant
5. Closing Remarks—Edna Renick
6. Date of Next Meeting
7. Adjournment