FUNDAMENTAL WORD PROCESSING SKILLS (205)

REGIONAL — 2014

Production Portion:

Job 1: Memorandum _____ (100 points)

Job 2: Table _____ (100 points)

Job 3: Report _____ (100 points)

Job 4: Agenda _____ (100 points)

TOTAL POINTS _____ *(400 points)*

Failure to adhere to any of the following rules will result in disqualification:
1. **Contestant must hand in this test booklet and all printouts. Failure to do so will result in disqualification.**
2. **No equipment, supplies, or materials other than those specified for this event are allowed in the testing area. No previous BPA tests and/or sample tests or facsimile (handwritten, photocopied, or keyed) are allowed in the testing area.**
3. **Electronic devices will be monitored according to ACT standards.**

No more than ten (10) minutes orientation
No more than 60 minutes testing/production
No more than ten (10) minutes wrap-up

GENERAL INSTRUCTIONS

1.   Make certain this test booklet contains Jobs 1-4.

2.   Correct all errors. Copy is graded on production standards.

3.   Use your contestant number for any job where you would normally use your reference initials. Your name or initials should NOT appear on any work you submit. Key your contestant number and job number as a footer on all work submitted unless otherwise specified.

4.   If you finish before the end of the 60 minutes of testing, notify the proctor. Time may be a factor in determining the winner in the event of a tie.

5.   When turning in your materials, place your scoring sheet on the top with your typed items in numerical order.

JOB 1— Memorandum

Key the following memo in correct Professional Business Associates' format to Ms. Edna Renick, Administrative Support Department Manager, from Julie Smith, Human Resources Department Manager concerning RECORDS MANAGEMENT AND RETENTION POLICIES. Use the current date.

We recently hired ten 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.

JOB 2— Table

Key the following table with borders in correct Professional Business Associates' format. The title of the table is RETENTION PERIODS. Center the table horizontally and vertically on the page. Center and bold column headings.

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

JOB 3— Report

Key the following report from Edna Renick, Administrative Support Department Manager. The recipients are Administrative Support Personnel in all departments. Key the report in proper Professional Business Associates' format. The title of the report is 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.

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 please when you retrieve pertinent information quickly. Yet, they may take the smooth operation of the records management system for granted.

JOB 4— Agenda

Directions: Key the following agenda information using Professional Business Associates'
agenda format. This is a Training Session for Administrative Support Personnel for Professional
Business Associates. The training will be held on Tuesday, March 10, 2014, at 9:00 a.m. in the
Records Room.

List the following agenda topics:

Welcome, Edna Renick, Administrative Support Department Manager
Objects and Topics, Kathryn Johnson, Administrative Assistant
Importance of Proper Records Keeping, Department Managers
Evaluation, Kathryn Johnson, Administrative Assistant
Closing Remarks, Edna Renick

Under Objects and Topics include the following subtopics:
Types of Storage Media, Mary Flynn
Filing Procedures, Deb Storm
Records Life Cycle, Jack Welch

The meeting was adjourned at 10:30 a.m., and the date of the next meeting will be April 3, 2014.

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)
	TOTAL POINTS	_____*(400 points)*

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

JOB 1—Memorandum

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

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RETENTION PERIODS
(QS)

</div>

Category	Active Storage	Inactive Storage
Bank reconciliations	3 years	Permanent
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Presentations	1 year	2 years

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:

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- Developing an efficient retrieval procedure

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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

Contestant Number
Job #