
Course Name

Code No.**I. COURSE DESCRIPTION:**

This course will give the student an understanding of the scope and complexities of the administrative management of records. Emphasis will be placed on managing and controlling documents from the time of their creation until their disposition. Current ARMA filing rules will be covered.

II. LEARNING OUTCOMES AND ELEMENTS OF THE PERFORMANCE:

Upon successful completion of this course, the student will demonstrate the ability to:

1. Demonstrate proficiency using the alphabetic, subject, numeric, and geographic filing systems for filing business correspondence, reports, and records.

Elements of the Performance

- File cards alphabetically containing names of individuals, businesses, and organizations.
- File correspondence alphabetically.
- Inspect, index, code, sort, and store correspondence.
- Retrieve materials from the files.
- Identify the basic terms and parts of card and correspondence filing systems.
- Prepare records to be filed, including cross-referencing procedures.
- File correspondence by subject.
- Create miscellaneous subject folders.
- File cards in a numeric system in which the cards are arranged in consecutive order, or low number to high.
- File cards in a numeric system in which the cards are arranged in terminal-digit order.
- Demonstrate proficiency using the geographic card file system.

This module will constitute 50% of the course grade.

2. Describe the role and importance of the profession of Records and Information Management.

Potential Elements of the Performance:

- Define records and information management (RIM).
- Recognize the functions of records and information management

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and the steps in the life cycle of records.

- Identify employment opportunities in both the private and public sectors that require records and information management expertise.
- Classify and describe specializations in records and information management.
- Describe the type of preparation required for employment in records and information management.
- Name and briefly describe the purpose of several professional associations for those who work in the field of records and information management.
- Distinguish between criminal and civil legal matters and discuss legal matters that are of importance to RIM employees.

This module will constitute 15% of the course grade.

3. Develop systems and procedures for managing non-electronic records.

Potential Elements of the Performance:

- Differentiate between paperwork and paper records.
- Identify the different types and sources of incoming paperwork.
- Differentiate among voice mail, e-mail, and fax documents.
- Recognize the costs of keeping versus discarding paperwork.
- Identify the different types and sources of outgoing and internal paperwork.
- Identify forms design and form filling software.
- Select equipment and supplies essential for the storage and maintenance of paper records.
- Follow efficient procedures for planning, establishing, and maintaining files for paper records.
- Describe procedures for retrieving records.
- Assess the advantages and disadvantages of alternate methods of records destruction.
- Recognize the environmental benefits of recycling records.

This module will constitute 15% of the course grade.

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4. Develop procedures and systems for Electronic Information Management.

Potential Elements of the Performance:

- Identify what is needed to create electronic filing systems.
- Name electronic folders and files appropriately using the principles of identification, brevity, and documentation.
- Describe the benefits of entering descriptive information into electronic records using proper records management techniques.
- Cite procedures for creating, labeling, and storing backups of electronic records.
- Identify the major components of a computer network.
- Classify the major elements of any image technology system.
- Define terms related to image technology and automated systems.
- Describe types of automated records management systems used to monitor an organization's records.
- Identify three major considerations in selecting an automated records management system.
- Outline ways of avoiding injuries in records areas.
- Identify several kinds of security devices used to protect records and data.
- Describe disaster prevention measures for records storage areas.
- Identify methods of restoring records after a disaster.

This module will constitute 20% of the course grade.

III. TOPICS:

1. Introduction to Records and Information Management
2. Employment in Records and Information Management
3. Legal and Ethical Matters in Records and Information Management
4. Receipt and Creation of Hard Copy Records
5. Indexing and Alphabetizing Procedures for Alphabetic, Subject, Numeric and Geographic Filing Systems
6. Systems for Organizing Paper Records
7. Records Retrieval, Retention, and Recycling
8. Managing Electronic Files
9. Network-Based Records Management
10. Image Technology and Automated Systems
11. Safety, Security, and Disaster Recovery

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IV. REQUIRED RESOURCES/TEXTS/MATERIALS:

Professional Records and Information Management, Jeffrey R. Stewart and Nancy M. Melesco, Glencoe/McGraw-Hill, 2002.

Quick Filing Practice, Fourth Edition, Stewart, McGraw-Hill Ryerson.

One manila file folder (letter size)

V. EVALUATION PROCESS/GRADING SYSTEM:

Two records management theory tests **45%**

Miscellaneous daily assignments (speaker/tour log, etc.) **5%**

Five filing quizzes -

Quiz 1 – Indexing rules 1-5

Quiz 2 – Indexing rules 1-10

Quiz 3 – Indexing rules 1-12

Quiz 4 – Alphabetic correspondence filing and
Subject correspondence filing

Quiz 5 – Numeric card filing and Geographic card filing **50%**

The following semester grades will be assigned to students in post-secondary courses:

| <u>Grade</u> | <u>Definition</u> | <u>Grade Point Equivalent</u> |
|--------------|---|-------------------------------|
| A+ | 90 - 100% | 4.00 |
| A | 80 - 89% | 4.00 |
| B | 70 - 79% | 3.00 |
| C | 60 - 69% | 2.00 |
| D | 50-59% | 1.00 |
| F (Fail) | 49% or below | 0.00 |
| CR (Credit) | Credit for diploma requirements has been awarded. | |
| S | Satisfactory achievement in field/clinical placement or non-graded subject areas. | |
| U | Unsatisfactory achievement in field/clinical placement or non-graded | |

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| X | subject areas. A temporary grade limited to situations with extenuating circumstances giving a student additional time to complete the requirements for a course. |
| NR | Grade not reported to Registrar's office. |
| W | Student has withdrawn from the course without academic penalty. |

VI. SPECIAL NOTES:Special Needs:

If you are a student with special needs (e.g. physical limitations, visual impairments, hearing impairments, or learning disabilities), you are encouraged to discuss required accommodations with your instructor and/or the Special Needs office. Visit Room E1204 or call Extension 493, so that support services can be arranged for you.

Retention of course outlines:

It is the responsibility of the student to retain all course outlines for possible future use in acquiring advanced standing at other post-secondary institutions.

Plagiarism:

Students should refer to the definition of "academic dishonesty" in *Student Rights and Responsibilities*. Students who engage in "academic dishonesty" will receive an automatic failure for that submission and/or such other penalty, up to and including expulsion from the course/program, as may be decided by the professor/dean. In order to protect students from inadvertent plagiarism, to protect the copyright of the material referenced, and to credit the author of the material, it is the policy of the department to employ a document format for referencing source material.

Course outline amendments:

The Professor reserves the right to change the information contained in this course outline depending on the needs of the learner and the availability of resources.

Substitute course information is available in the Registrar's office.

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Test papers will be returned to the student after grading in order to permit verification of the results and to review the tests. However, the student will be required to return all test papers to the professor who will keep them on file until the end of the next module. Any questions regarding the grading of individual tests must be brought to the professor's attention within two weeks of the paper being returned.

Students are expected to be present to write all tests during regularly scheduled classes.

In the event of a failed course grade, a supplementary test for the records management theory component will be administered to replace EITHER the lowest failed OR one missed test. Missed filing quizzes may be written at the end of the semester.

It is expected that 100 percent of classroom work/projects will be completed and submitted on time. A late assignment with an attached Extension form will be accepted if submitted within 72 hours of the due date and time. Twenty-five percent will be deducted from late assignments automatically. Failure to follow this procedure will result in a zero grade for the assignment.

Marks will be deducted for incomplete work. Producing accurate work is fundamental to this course. Marks will be deducted for inaccuracies.

All work must be labeled with the student's name and the project information on each page. All work must be submitted in a labeled folder.

Students must ensure that they have the appropriate tools to do the test, i.e. pencil, pen, etc.

Occasionally, tours and guest speakers may be arranged outside of class time, and students are expected to arrange their schedules to accommodate attendance at these sessions. Tour/speaker logs may be required as part of the miscellaneous daily assignments mark. A student who misses a tour or a guest speaker will receive a grade of zero for the miscellaneous assignments component of the final grade.

Regular attendance is expected so the professor can observe work and provide guidance as necessary. In-class observation of student work and guidance by the professor aids student success. Lectures will not be repeated in subsequent classes.

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VII. PRIOR LEARNING ASSESSMENT:

Students who wish to apply for advanced credit in the course should consult the professor. Credit for prior learning will be given upon successful completion of a challenge exam or portfolio.

VIII. DIRECT CREDIT TRANSFERS:

Students who wish to apply for direct credit transfer (advanced standing) should obtain a direct credit transfer form from the Dean's secretary. Students will be required to provide a transcript and course outline related to the course in question.