

**Capstone Project Assignments****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.

<b>Category</b>	<b>Active Storage</b>	<b>Inactive Storage</b>
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 pleased when you retrieve pertinent information quickly. Yet, they may take the smooth operation of the records management system for granted.

## **Job 4 – Agenda**

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.

### **Job 5 – Letter**

Key the following business letter from Julie Smith, Manager, Human Resources following Professional Business Associates' format. Use the current date for the document. The letter is to be sent to John Jones, 5445 Eaglecrest Dr., Galloway, OH 43119

I am confirming receipt of your application letter and resume; however, I am not able to process your application.

A few months ago, our company converted to an online application process and we no longer accept applications other than online. Please be aware that we only accept one online submission from each individual.

Our online process begins at [www.PBA.org](http://www.PBA.org) and you will find that the new system is a user friendly process. The website has buttons for each of our departments: Financial Services, Information Technology, Human Resources, Marketing, and Administrative Support. Each department lists current job openings by job title as well as instructions for submitting application letters, resumes, and supporting documents.

Thank you for your interest in employment with Professional Business Associates.

Sincerely

## Job 6 – News Release

Key the following news release using Professional Business Associates' format. The news release will be from Nancy Wells, 5454 Cleveland Avenue, Columbus, OH 43231-1234, 614-555-5555 and should be dated with the current date. The title should be Professional Business Associates Selected as Employee Friendly.

*Two years ago, Professional Business Associates' management discovered that it was increasingly difficult to keep good employees. PBA then set a goal to be recognized as one of the best companies that people would like to work for.*

*To achieve their goal, Professional Business Associates created an open communication dialogue between their management and employees. From those discussions, PBA developed and adopted an employee suggested flex-work day as well as flex-work week policy. Professional Business Associates' management discovered that their employees working on a flex schedule seemed happier and were more productive.*

*PBA initiated additional employee friendly perks such as an emergency daycare program as a backup when their employees' regular daycare was not available.*

*Professional Business Associates is proud to be named one of the top 100 employee friendly businesses and plans to continue implementing employee friendly work practices.*