Filing in all aspects—alphabetic, subject, numeric, geographic, and chronological—and along with the organization and management of filing systems makes up the thrust of the course content in the curriculum guide. The objective is to prepare students for office occupations. Content includes course guidelines, performance objectives, learning activities, evaluative instruments, and student and teacher resources. More than one-half of the pamphlet contains appendixes of tests and keys. (NH)
AUTHORIZED COURSE OF INSTRUCTION FOR THE QUINMESTER PROGRAM

FILING AND FINDING

Business Education--7733.01 (New: 7742.01)
FILING AND FINDING
7733.01 (New: 7742.01)
Business Education

Written by Mary Wessels
And Approved by the Business Education Steering Committee
For Quimnester Courses
for the
DIVISION OF INSTRUCTION
Dade County Public Schools
Miami, FL 33132
1972
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<td>Chronological Filing Test</td>
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<td>Chronological Arrangement Test</td>
<td>29</td>
</tr>
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<td>Chronological Arrangement Key</td>
<td>30</td>
</tr>
</tbody>
</table>
I. COURSE TITLE—FILING AND FINDING

II. COURSE NUMBER—7733.01 (New: 7742.01)

III. COURSE DESCRIPTION

A. Synopsis
Includes all aspects of filing using alphabetic, subject, numeric, geographic, and chronological systems; also includes organization and management of filing systems.

B. Textbook
One of the state adopted textbooks for filing or office practice and/or one of the school's choosing.

C. Occupational Relationships
Secretary
General office clerk
File clerk
Data processing clerk
Records clerk

A knowledge of filing is useful in many occupations, clerical or professional.

IV. COURSE ENROLLMENT GUIDELINES

A. Prior Experiences Needed
The student should have attained the objectives of E-Z Way to Type or The Typewriter and You prior to enrollment in this course.

B. Pretest
A pretest should be administered at the beginning in order to determine if the student has attained the objectives of E-Z Way to Type or The Typewriter and You and to diagnose individual problems in order to determine placement within this course. It is therefore desirable that the pretest be designed to include the objectives of this course as well as prior courses.

C. Relation to Other Courses
Filing is a basic office skill; it is recommended that this course be taken before The Office in Action or Receptionist Training.

V. COURSE OF STUDY PERFORMANCE OBJECTIVES

Upon completion of this course, the students will be able to—

1. demonstrate a working knowledge of record controls using given cards with names of individuals and organizations that have an indefinite number of units by indexing, coding, and filing the cards alphabetically;

2. relate the filing process to the informational needs of a business by coding, filing, and finding a given number of miniature letters;
V. COURSE OF STUDY PERFORMANCE OBJECTIVES, Continued

3. set up a numeric filing system given the last number assigned in the file and 20 pieces of correspondence in an accumulated miscellaneous file;

4. code 20 pieces of correspondence for a geographic file;

5. demonstrate ability to locate ten geographic correspondents when given 3" x 5" cards arranged in alphabetical order and a geographic file;

6. demonstrate ability to file by subject by choosing the main heading under which to file ten pieces of correspondence and/or business forms and ability to identify proper cross references;

7. answer 20 questions correctly concerning the organization of the files, records, disposition, charge methods, follow-up methods, transfer methods, protection of records, and microfilming; and

8. type ten 3" x 5" index cards properly for an indexing system from given names, addresses, and other pertinent information.

VI. COURSE CONTENT

A. Equipment and Supplies
   1. Basic
      a. Typing desk
      b. Typewriter—manual or electric
      c. Chair (posture)
      d. Textbook and instructional materials
      e. Index cards (3" x 5")
      f. Paper and pencil
      g. Incoming and outgoing tray
      h. Stapler
      i. Erasers
      j. Card file boxes
      k. Vertical card files
      l. Filing cabinets
      m. Visible files
      n. Folders and guides of various types and sizes
      o. Tickler file
      p. Sorter
      q. Collection tray
   2. Supplementary
      a. Overhead and/or opaque projector and screen
      b. Filmstrip projector and screen
      c. Record player and records

B. Filing Records
   1. Nature and scope of filing systems
   2. Types of materials to be filed
VI. COURSE CONTENT, Continued

a. Correspondence
   (1) Letters (incoming)
   (2) Copies of outgoing letters
   (3) Interoffice communications
   (4) Telegrams, cablegrams, telefax
b. Mailing lists
c. Requisitions
d. Legal documents
e. Magazines
f. Magazine articles
g. Records
   (1) Accounting
      (a) Checks
      (b) Sales
   (2) Personnel
   (3) Stock (inventory)
h. Reports
i. Special business documents
   (1) Accounts
   (2) Stocks and bonds
   (3) Other

3. Organization of files
   a. Guides
      (1) Primary
      (2) Secondary or auxiliary
      (3) Special auxiliary
   b. Tabs
c. Captions
d. Folders
   (1) Full cut
   (2) One-half cut
   (3) One-third cut
   (4) One-fifth cut
   (5) Special
   (6) Individual
   (7) Miscellaneous

4. Basic filing procedures
   a. Collecting papers for the file
   b. Time stamp
c. Deliver
d. Release mark
e. Index
f. Code
g. Cross reference (when necessary)
h. Sort
i. File

C. Alphabetical Filing—Indexing Rules
   1. Individual names
      a. Nothing before something
      b. Prefixes or surname particles
VI. COURSE CONTENT, Continued

c. Compound surnames
d. Initials and abbreviations
e. Titles
f. Married women
g. Unusual names

2. Business names
   a. Words to disregard
   b. Full individual names or individual surnames only
   c. Famous names
d. Abbreviations and single letters
e. Compound and hyphenated names
f. Titles
   g. Numbers
   h. Possessives
   i. Identical
   j. Compound geographic
   k. Compound foreign

3. Other names
   a. Hotels and motels
   b. Schools
c. Colleges and universities
d. Churches and synagogues
e. Clubs and service organizations
f. Newspapers and periodicals
g. Governmental names
   h. Political subdivisions
   i. Foreign governments

D. Numeric Filing
   1. Advantages and disadvantages
   2. Index card control file
   3. Miscellaneous alphabetic file
   4. Accession book or register
   5. Numeric coding
   6. Terminal digit
   7. Middle digit
   8. Consecutive digit

E. Subject Filing
   1. Direct subject method
   2. Direct alphabetic method
   3. Encyclopedic method
   4. Alpha-numeric subject
      a. Subject decimal
      b. Direct decimal-subject

F. Geographic Filing
   1. In an alphabetic system
   2. By subjects

G. Commercial Filing Systems
VI. COURSE CONTENT, Continued

H. Records Management
   1. Organization
      a. Central files
      b. Desk files
      c. Departmental
   2. Charge methods
      a. Out card
      b. Out sheet
      c. Out guide
      d. Out folder
      e. Carrier folder
      f. Facsimile copies
      g. Cancelling charge-outs
   3. Follow-up
      a. Card tickler tracing file
      b. Follow-up for specific future date
      c. Dated follow-up folders
      d. Signal follow-up folders
   4. Alternative methods of managing records
      a. Facsimile copies
      b. Microfilm copies (sheet and roll)

I. Transferring Records
   1. Perpetual method
   2. Periodic methods and records center
      a. One-period plan—removal on certain date
      b. Two-period plan—duplicate files maintained, one active
         and one inactive
      c. Maximum-minimum plan—inactive material transferred at
         regular intervals

J. Retention and Disposition of Records

K. Protecting Vital Records

L. Microfilming
   1. Duplication copying
   2. Retrieval
   3. Communications
   4. Publishing
   5. Microfilm formats
   6. Roll
   7. Jackets
   8. Aperture Cards
   9. Microfilm filing

M. Information Retrieval Systems
VII. SUGGESTED PROCEDURES, STRATEGIES, AND LEARNING ACTIVITIES

A. Individualized Instruction

The teacher could prepare learning activity packages, assignment sheets, and/or job sheets. Indexing rules could be learned four or five at a time with practical application of these rules and self-evaluation (keys provided) immediately following. Memorization of rules is facilitated by use of filing sound-films (teacher-made, Gregg, or Coronet—see Resources for Students) and individual listening stations. Filing practice sets are available from many publishing companies (see Appendix). Self-checking devices, tests, and practical filing activities are provided in most of these practice sets.

Students should be encouraged to proceed at their own rates of speed; advanced filing activities should be prepared for the faster students. Such activities could include practical application of filing knowledge in the school's office, teachers' classrooms, or the school library. However, care should be taken to see that careful supervision is provided so that the students can participate in meaningful learning experiences.

B. Student Participation

Students could bring their favorite records to class. Index cards could then be prepared using the record titles as the primary reference. Cross references under the name of the composer and the artist could also be prepared. Similar activities could be provided by having students bring in letters or recipes.

C. Field Trips

The class could be taken to business offices to observe the various filing methods being used. If this isn't possible, the class could be taken on a tour of the school's main office to observe the manner in which school records are maintained. It is suggested that such activities should be arranged after most of the students have learned the basic filing principles.

D. Typing Index Cards

After most of the indexing rules have been learned, students could type 3" x 5" index cards for each person in the class or for each teacher in the school, typing names in proper indexing order. The cards could then be alphabetized.

Practice in typing index cards for a numeric filing system could be provided by having students type the names of the members of the football team (or another athletic team), and prepare a cross referencing system based on the players' jersey numbers.
VII. SUGGESTED PROCEDURES, STRATEGIES, AND LEARNING ACTIVITIES, Continued

Some local schools have addressing machines. Students could prepare and maintain address plates for the principal, PTA, FBLA, or other groups.

E. Timed Learning Activities

After a filing practice set or activity has been completed, the teacher should give the students an opportunity to evaluate their own progress. Since the reason for filing is finding, progress can be evaluated through the use of a finding test.

One suggestion for such an activity would be for the teacher to pass out a list of items, index cards, or correspondence for the students to locate. This list should be left face down on the students' desks until the teacher gives the word to start. A stopwatch or some other timing device should be started when the word is given. When a student locates all of the items on the list, he would bring his test to the front and the teacher would write the time taken to complete on the front of the test. Keys would then be made available so that the students could check the accuracy of their work. A total score could be computed by adding the time to the number of errors. Of course, students with the lowest number of points would have the best scores. The same procedure could be used for testing purposes, but the teacher would check the individual papers.

F. Other Teaching Suggestions

1. Current trends in filing tend to indicate that there is an increasing stress on the basic alphabetic system with numeric application. For example, social security numbers are now being issued to all ninth grade students in Dade County in order to provide student numbers. The University of Miami is also using these numbers for their students.

2. Filing rules should not be taught by rote but by application.

3. The development of skill in coding appears to be the most difficult phase of filing mastery, but it is an important key to filing success. Therefore, a great proportion of class time should be spent on the development of this skill.

4. The soundex filing system can be used to advantage, especially when foreign names are encountered. It can be taught in one or two class periods and is a very popular motivational device.

5. When a student is taking a series of office practice courses, it is recommended that he/she take this course as early in the sequence as possible in order to allow practice and use of filing skills in subsequent courses.
VIII. EVALUATIVE INSTRUMENTS

The following tests are examples of items that may be used to evaluate student progress. Examples are located in the Appendix.

<table>
<thead>
<tr>
<th>ITEM</th>
<th>PURPOSE</th>
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<tbody>
<tr>
<td>A. Alphabetic Filing</td>
<td>To determine if the students are applying the filing rules.</td>
</tr>
<tr>
<td>1. Cards</td>
<td>When students have learned all the rules, a written test may be admin-</td>
</tr>
<tr>
<td></td>
<td>istered in which students are instructed to find a card and tell what</td>
</tr>
<tr>
<td></td>
<td>is filed before and after the card. This type of test should be</td>
</tr>
<tr>
<td></td>
<td>timed. Pupils should be able to &quot;find&quot; about three cards a minute.</td>
</tr>
<tr>
<td>2. Correspondence</td>
<td>To determine if the students are inspecting, indexing, and coding</td>
</tr>
<tr>
<td></td>
<td>properly.</td>
</tr>
<tr>
<td></td>
<td>After rules have been learned, students are ready to proceed to a</td>
</tr>
<tr>
<td></td>
<td>correspondence practice set or sets. Most business education publishers</td>
</tr>
<tr>
<td></td>
<td>have them available in alphabetic, subject, numeric, and geographic</td>
</tr>
<tr>
<td></td>
<td>systems.</td>
</tr>
<tr>
<td>3. Procedures</td>
<td>To test students on filing procedures and vocabulary.</td>
</tr>
<tr>
<td>B. Numeric Filing</td>
<td>To determine if the students are coding the correspondence and</td>
</tr>
<tr>
<td></td>
<td>placing the number assigned to that individual in proper order.</td>
</tr>
<tr>
<td>C. Geographic Correspondence</td>
<td>To determine whether the students can file by geographic locations of</td>
</tr>
<tr>
<td></td>
<td>state, city or town, and finally by the correspondent's name.</td>
</tr>
<tr>
<td>D. Subject Correspondence</td>
<td>To determine whether the students can recognize the main heading</td>
</tr>
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<td></td>
<td>under which to file various topics or business papers and make proper</td>
</tr>
<tr>
<td></td>
<td>cross-references.</td>
</tr>
</tbody>
</table>
VIII. EVALUATIVE INSTRUMENTS, Continued

ITEM | PURPOSE
--- | ---
E. Chronological Arrangement | To measure the students' ability to determine a follow-up date on an item, place it behind the correct monthly guide, and file the item in the appropriate day-date file of the current month.

A final examination for the course should measure achievement of all of the objectives of the course.

IX. RESOURCES FOR STUDENTS

A. Books and Booklets


- Gregg, John Robert; Fries, Albert C.; Rowe, Margaret; and Travis, Dorothy L. *Applied Secretarial Practice*, 5th edition. New York: Gregg Division of McGraw-Hill Book Co., 1962. (Unit 17)
IX. RESOURCES FOR STUDENTS, Continued

A. Books and Booklets, Continued

Gregg, John Robert; Fries, Albert C.; Rowe, Margaret; and Travis, Dorothy L. *Applied Secretarial Practice*, 6th edition. New York: Gregg Division of McGraw-Hill Book Co., 1968. (Units 16 and 17)


B. Practice Sets and Workbooks

Workbooks are available for most of the textbooks listed in the previous section from the respective publishing companies.


IX. RESOURCES FOR STUDENTS, Continued

B. Practice Sets and Workbooks, Continued


C. Filmstrips and Transparencies


Kahn, Gilbert; Yerian, Theodore; and Stewart, Jeffrey R. Progressive Filing Series, Complete filmstrip set. New York: Gregg Division of McGraw-Hill Book Co.

Travis, Dorothy. EDL Filing Filmstrip Set. New York: Gregg Division of McGraw-Hill Book Co.

X. RESOURCES FOR TEACHERS

A. Books, Manuals, and Handbooks

Teacher editions, handbooks, keys, and/or manuals are available to accompany most of the books and materials listed in the "Resources for Students" division of this course. They are usually available free if the school is using a class set or more of the respective publisher's textbooks. Additional books and booklets that may be of value to the teacher follow.


X. RESOURCES FOR TEACHERS, Continued

A. Books, Manuals, and Handbooks, Continued


B. Periodicals


C. Wall Charts

Gregg Filing Wall Charts. New York: Gregg Division of McGraw-Hill Book Co. (Set of eight)

D. Films

Filing Procedures in Business. Color, 13½ min., 16mm, Instructional Materials Catalog, Dade County Public Schools, 1-11570.

ALPHABETIC FILING TEST

Directions: After each group, indicate the order in which the names given should be arranged in an alphabetic file.

EXAMPLE: (a) John Reynolds; (b) Walter Richardson; (c) J. Price.

1. (a) 11th Hour Cleaners; (b) 7 to 11 Supermarket; (c) 2-Minute Car Wash.
2. (a) Charles A. Quincy; (b) Charles S. Quinn; (c) Charles W. Quince.
3. (a) By the Road Inn; (b) Rest Haven Motel; (c) Best Well Hotel.
4. (a) B. P. Cramer; (b) B. O. Cramer; (c) B. U. Cramer.
5. (a) South East Timber Products, Inc.; (b) Southeast Utilities Inc.; (c) Southern Paper Co., Inc.
6. (a) Chas. Helms; (b) Charlene Harris; (c) Barbara Hoggard.
7. (a) Victor C. Vinson; (b) C. Vinson; (c) Victor Vinson.
8. (a) Jeff O'Neil; (b) Jefferson O'Neil; (c) J. J. Neilson.
9. (a) D. and O. Corporation; (b) DCO Co.; (c) Coretta Sue Dolman.
10. (a) Cmdr. Perry; (b) Carlton Perriman; (c) Percy C. Cojock.
11. (a) Peace Motel; (b) Peace Hotel; (c) Blackstone Inn.
12. (a) Reynolds'; (b) Mary E. Reynolds; (c) Mary Ellen Reynolds.
13. (a) Mary St. James; (b) Mary S. James; (c) Maureen Sammons.
14. (a) Brien O. Percy; (b) Brian Oscar Percy; (c) Brien Percy.
15. (a) Paul's Mkt.; (b) Mfg. for Progress, Inc.; (c) O. A. Nassey.
16. (a) One Bill Credit Plan; (b) $1000 Club; (c) 102 Street Garage.
17. (a) John Tyler Motel; (b) The College Inn; (c) Davidson Motel.
18. (a) Shelby's; (b) Aileen Shelby; (c) A. Shelby.
19. (a) Ella E. Van Dorn; (b) Debra VanHorne; (c) Harold H. Horne.
20. (a) Allen J. King; (b) Alan James King; (c) Alton J. King.
21. (a) Norris B. Haver; (b) Oscar E. Bell; (c) Norman Bell-haven

22. (a) Clifton-Davis Florists; (b) Eva J. Clifton; (c) Donald D. Davis

23. (a) Father Flannigan; (b) Faye Fuller (Mrs. Wm. C. Fuller); (c) The Fulton Monument Co.
CODING FOR FILING

Directions: (1) On each of the following cards, type or write the name in correct indexing order on the top line of the card.
(2) Underline the entire first indexing unit of the name.
(3) Number the remaining units in the name by writing above those units the numbers 2, 3, and so on, to indicate the rank of the units in the indexing order. Place the title (Mr., Miss, Etc.) in parentheses after the name.

<table>
<thead>
<tr>
<th>Miss Helen Claire DeLong</th>
<th>Mr. Lawrence Lynn Smith</th>
</tr>
</thead>
<tbody>
<tr>
<td>1902 Commons Boulevard</td>
<td>12121 Lake Road</td>
</tr>
<tr>
<td>Boston, MA 02115</td>
<td>Duluth, MN 55814</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>RCA Service, Inc.</th>
<th>Miss Mary Lou St. John</th>
</tr>
</thead>
<tbody>
<tr>
<td>222 Ocean View Drive</td>
<td>32 Eastwood Circle</td>
</tr>
<tr>
<td>Honolulu, HI 96813</td>
<td>Alexandria, VA 22321</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Johns-Richardson, Inc.</th>
<th>100 Dealers Association</th>
</tr>
</thead>
<tbody>
<tr>
<td>1002 Mountain Road</td>
<td>9904 Penn Highway</td>
</tr>
<tr>
<td>Fairbanks, AK 99701</td>
<td>Philadelphia, PA 19136</td>
</tr>
<tr>
<td>Name</td>
<td>Address</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>-----------------------------</td>
</tr>
<tr>
<td>Sister Anne Marie</td>
<td>St. Paul Convent</td>
</tr>
<tr>
<td></td>
<td>2514 Smith Street</td>
</tr>
<tr>
<td></td>
<td>Hagerstown, MD 21746</td>
</tr>
<tr>
<td>Mrs. Charles (Marie) Peters</td>
<td>3395 Third Street</td>
</tr>
<tr>
<td></td>
<td>Gary, IN 46419</td>
</tr>
<tr>
<td>Fine-Fit Custom Clothes</td>
<td>2222 Prospect Street</td>
</tr>
<tr>
<td></td>
<td>Nashville, TN 37226</td>
</tr>
<tr>
<td>South Eastern Motor Service</td>
<td>1229 Carlyon Road</td>
</tr>
<tr>
<td></td>
<td>Augusta, GA 30904</td>
</tr>
<tr>
<td>Rev. R. Arnold Jones</td>
<td>3399 Rosemond Avenue</td>
</tr>
<tr>
<td></td>
<td>Bridgewater, CT 06611</td>
</tr>
<tr>
<td>New York Catering Service</td>
<td>2212 Fifth Avenue</td>
</tr>
<tr>
<td></td>
<td>New York, NY 10047</td>
</tr>
<tr>
<td>Chicken Take-Out Center</td>
<td>196 Lumberton Road</td>
</tr>
<tr>
<td></td>
<td>Concord, NH 03302</td>
</tr>
<tr>
<td>Mr. Cort Johnson</td>
<td>900 Pueblo Boulevard</td>
</tr>
<tr>
<td></td>
<td>Pueblo, CO 81015</td>
</tr>
</tbody>
</table>
C011114k1 FUR PILING KEY

Chicken Take-Out Center

Delong, Helen Claire (Miss)

Fine-Fit Custom Clothes

Johns-Richardson, Incorporated

Johnson, Cort (Mr.)

Jones, R. Arnold (Rev.)

One-Hundred Dealers Association

New York Catering Service

Peters, Marie L. (Mrs. Charles)

RCA Service, Incorporated

Sister Anne Marie

Smith, Lawrence Lynn

South Eastern Motor Service

St. John, Mary Lou (Miss)
CORRESPONDENCE FILING TEST

Directions: Below are the names of ten individuals, firms, and institutions taken from the correspondence file. In the columns headed Names Written for Indexing, write the names in the correct form for indexing. In the columns headed Correct Arrangement, arrange the names in correct alphabetic order.

<table>
<thead>
<tr>
<th>Names Written for Indexing</th>
<th>Names</th>
<th>Correct Arrangement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Names</td>
<td>Unit 1</td>
</tr>
<tr>
<td>1. Miller Bros.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Miller Co.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Thomas Ludwig Miller</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Colby B. Miller</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Conrad Miller, Inc.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Thomas Louis Miller</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Miller Commission Co.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. B. Warren Miller</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Thomas Miller, Ltd.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Conrad Ince Miller</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Correct Arrangement

<table>
<thead>
<tr>
<th>Correct Arrangement</th>
<th>Unit 1</th>
<th>Unit 2</th>
<th>Unit 3</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>
Directions: Below are the names of ten individuals, firms, and institutions taken from the correspondence file. In the columns headed *Names Written for Indexing*, write the names in the correct form for indexing. In the columns headed *Correct Arrangement*, arrange the names in correct alphabetic order.

<table>
<thead>
<tr>
<th>Names</th>
<th>Names Written for Indexing</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Lewis S. Bates Infirmary</td>
<td>Unit 1  Unit 2  Unit 3  Unit 4  Unit 5</td>
</tr>
<tr>
<td>2. Bates Insurance Agency</td>
<td></td>
</tr>
<tr>
<td>3. L. Bates</td>
<td></td>
</tr>
<tr>
<td>4. L. S. Bates Coal Company</td>
<td></td>
</tr>
<tr>
<td>5. L. Stephen Bates</td>
<td></td>
</tr>
<tr>
<td>6. Bates Lumber Yard</td>
<td></td>
</tr>
<tr>
<td>7. Bates Loan Office</td>
<td></td>
</tr>
<tr>
<td>8. L. Bates Lock Services</td>
<td></td>
</tr>
<tr>
<td>9. Bates Library Foundation</td>
<td></td>
</tr>
<tr>
<td>10. Bates Leather Company</td>
<td></td>
</tr>
</tbody>
</table>

**Correct Arrangement**

<table>
<thead>
<tr>
<th>Unit 1</th>
<th>Unit 2</th>
<th>Unit 3</th>
<th>Unit 4</th>
<th>Unit 5</th>
</tr>
</thead>
<tbody>
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</tr>
</tbody>
</table>
## CORRESPONDENCE TEST KEY

**Names Written for Indexing and Correct Arrangement**

<table>
<thead>
<tr>
<th>Unit 1</th>
<th>Unit 2</th>
<th>Unit 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Miller</td>
<td>B.</td>
<td>Warren</td>
</tr>
<tr>
<td>Miller</td>
<td>Bros.</td>
<td></td>
</tr>
<tr>
<td>Miller</td>
<td>Colby</td>
<td>B</td>
</tr>
<tr>
<td>Miller</td>
<td>Commission</td>
<td>Company</td>
</tr>
<tr>
<td>Miller</td>
<td>Company</td>
<td></td>
</tr>
<tr>
<td>Miller</td>
<td>Conrad</td>
<td>Ince</td>
</tr>
<tr>
<td>Miller</td>
<td>Conrad</td>
<td>Incorporate</td>
</tr>
<tr>
<td>Miller</td>
<td>Thomas</td>
<td>Limited</td>
</tr>
<tr>
<td>Miller</td>
<td>Thomas</td>
<td>Louis</td>
</tr>
<tr>
<td>Miller</td>
<td>Thomas</td>
<td>Ludwig</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unit 1</th>
<th>Unit 2</th>
<th>Unit 3</th>
<th>Unit 4</th>
<th>Unit 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bates</td>
<td>Insurance</td>
<td>Agency</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bates</td>
<td>L.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bates</td>
<td>L.</td>
<td>Lock</td>
<td>Services</td>
<td></td>
</tr>
<tr>
<td>Bates</td>
<td>L.</td>
<td>S.</td>
<td>Coal</td>
<td>Company</td>
</tr>
<tr>
<td>Bates</td>
<td>Leather</td>
<td>Company</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bates</td>
<td>Lewis</td>
<td>S.</td>
<td>Infirmary</td>
<td></td>
</tr>
<tr>
<td>Bates</td>
<td>Library</td>
<td>Foundation</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bates</td>
<td>Loan</td>
<td>Office</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bates</td>
<td>Lumber</td>
<td>Yard</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Which of these terms...

1. Auxiliary guide
2. Cabinet
3. Card files
4. Carrier folder
5. Charge method
6. Cycle method
7. Disposing
8. Expansion
9. Filing period
10. Folder
11. Follow-up
12. Given name
13. Guide
14. Indexing
15. Individual folder
16. Legal name
17. Microfilming
18. Miscellaneous
19. Out folder
20. Periodic transfer
21. Perpetual transfer
22. Requisition slip
23. Surname
24. Tab
25. Title
26. Unit
27. Vertical filing
28. Visible filing

... may be described in these words:

**EXAMPLE:** Storage of records in specially designed equipment so that the information near the edges can be seen easily.

**KEY**

1. A span of time during which records remain in the active file.
2. A man's full name.
3. Purpose for scores along the front flap of a file folder.
4. The last name of an individual.
5. Selecting the captions under which a record is to be filed.
6. A manila container which holds correspondence in files.
7. Eliminating records which are no longer used.
8. Contains records for correspondents or subjects not active enough to warrant individual folders.
9. An individual's first name.
10. Folder for storing correspondence while regular folder is out of the files.
11. Constant removal of records from current to inactive files.
12. A container with drawers for housing filed records.
13. A folder used to transport records.
14. Removal of records from current to inactive files at stated intervals.
15. Divided into two basic kinds: visible and vertical.
PROCEDURES FILING TEST, Continued

16. A projection above the body of guides and folders on which the caption appears
17. Serves as a support for the records in the file drawer
18. Equivalent to the two-period transfer plan
19. Storage of records on edge
20. Folder that contains records concerning only one correspondent
21. Considered an indexing unit only when it precedes a single name
22. Photographing records in a greatly reduced size to conserve filing space
23. Each part of a name used in indexing
24. Checking on borrowed records to effect their return to the files
25. A procedure used to affix responsibility for records that have been removed from the files
26. Subdivides the section of a file controlled by a primary guide
27. A form used to request records from the files
GEOGRAPHIC CORRESPONDENCE FILING TEST

Directions: Type the following names and addresses on cards. Arrange the list geographically considering first the state location, then the city or town location, and finally the correspondent's name. Correct any errors.

(a) William F. Behrens
   West Beach Blvd.
   Biloxi, MS 39530

(b) M. L. James
   Highway 16
   Jackson, MN 56143

(c) Keenan Bros.
   Hennepin Ave.
   Minneapolis, MN 55400

(g) Helen Townsend
   S. Saginaw St.
   Flint, MI 48500

(h) Mary James
   University Ave.
   St. Paul, MN 55100

(i) Clancy Rug Service
   East Capitol St.
   Jackson, MS 39200

(j) The Robert Geyer Co.
   9th Ave.
   St. Cloud, MN 56301

(k) Van Houten Agency
   E. Kirby Ave.
   Detroit, MI 48200

(l) Main Auto Sales
   Spring Arbor Road
   Jackson, MI 56143

(m) F. W. Zoller
   Michigan Ave.
   Dearborn, MI 48120

(d) Scott Moving Co.
   Monroe Ave.
   Grand Rapids, MI 49500

(e) William J. Behrens
   14th St.
   Gulfport, MS 39501

(f) Philip LaMarca
   2nd Ave.
   Rochester, MN 55901

(n) Dr. A. T. Dailey
   Clay St.
   Vicksburg, MS 39180

(o) Thomas Winslow
   Temple St.
   Detroit, MI 48200

(p) Emerson Laundry Service
   5th St.
   Meridian, MI 39301

(q) R. Miller
   South Thayer St.
   Ann Arbor, MI 48103

(r) Martin Frisch
   Pearl St.
   Natchez, MS 39120

(s) Richard Horn
   E. Superior St.
   Duluth, MN 55800

(t) R. A. Miller
   Washington St.
   Battle Creek, MI 49014
GEOPHAGIC CORRESPONDENCE FILING TEST KEY

(a) Mich., Ann Arbor
    R. Miller
    South Thayer Street

(b) Mich., Battle Creek
    R. A. Miller
    Washington Street

(c) Mich., Dearborn
    F. W. Zoller
    Michigan Avenue

(d) Mich., Detroit
    Van Houten Agency
    East Kirby Avenue

(e) Mich., Detroit
    Thomas Winslow
    Temple Street

(f) Mich., Flint
    Helen Townsend
    South Saginaw Street

(g) Mich., Grand Rapids
    Scott Moving Co.
    Monroe Avenue

(h) Mich., Jackson
    Main Auto Sales
    Spring Arbor Road

(i) Minn., Duluth
    Richard Horn
    East Superior Street

(j) Minn., Jackson
    M. L. James
    Highway 16

(k) Minn., Minneapolis
    Keenan Bros.
    Hennepin Avenue

(l) Minn., Rochester
    Phillip LaMarca
    Second Avenue

(m) Minn., Saint Cloud
    Robert Geyer Co. (The)
    Ninth Avenue

(n) Minn., Saint Paul
    Mary James
    University Avenue

(o) Miss., Biloxi
    William H. Behrens
    West Beach Blvd.

(p) Miss., Gulfport
    William J. Behrens
    14th Street

(q) Miss., Jackson
    Clancy Rug Service
    East Capitol Street

(r) Miss., Meridian
    Emerson Laundry Service
    Fifth Street

(s) Miss., Natchez
    Martin Frisch
    Pearl Street

(t) Miss., Vicksburg
    A. T. Dailey (Dr.)
    Clay Street

NUMERIC FILING TEST

It is recommended that the teacher prepare a numeric filing test and key by using the ZIP codes for the names and addresses in the "Geographic Correspondence Filing Test."
PART I:

Directions: Alphabetize the following categories under Automobile Accessories and Supplies, Garden Equipment and Supplies, and Household Appliances and Supplies. One category may have more than one classification.

(a) Seeds  (m) House Radios
(b) Tires  (n) Washing Machines
(c) Fertilizers  (o) Wheelbarrows and other Outside Wheel Tools
(d) Freezers
(e) Dish Washers  (p) Vacuum Cleaners
(f) Car Batteries  (q) Refrigerators
(g) Lawn Mowers and Sweepers  (r) Car Heaters
(h) Floor Polishes and Waxes  (s) Seat Covers
(i) Home Air Conditioners
(j) Spades, Rakes, Hoes, and other Hand-Planting Tools
(k) Sewing Machines
(l) Auto Tools

PART II:

Directions: The Live and Let Live Drug Store has three primary captions in its subject file: Alphabetize the following under Cameras and Accessories, Cosmetics, and Medicines.

(a) Vitamins  (n) Liniments
(b) Compacts  (o) Eye Make-Up
(c) Face Powder and Rouge  (p) Flash Bulbs
(d) Projectors  (q) Hair Shampoos and Lotions
(e) Film  (r) Bandages and Adhesive Tapes
(f) Headache Remedies  (s) Perfumes
(g) Light Meters  (t) Enlargers
(h) Lipsticks
(i) Nail and Hand Beautifiers
(j) Laxatives
(k) Stomach Pills
(l) Filters
(m) Beauty Creams  (n) Liniments

PART I:

1. Automobile Accessories and Supplies
   a. Auto Tools
   b. Car Batteries
   c. Car Heaters
   d. Dehumidifiers
   e. Oil and Antifreeze
   f. Seat Covers
   g. Tires

2. Garden Equipment and Supplies
   a. Fertilizers
   b. Hose and Sprinklers
   c. Lawn Mower and Sweepers
   d. Seeds
   e. Spades, Rakes, Hoes, and other Hand-Planting Tools
   f. Wheelbarrows and other Outside Wheel Tools

PART II:

1. Cameras and Accessories
   a. Camera
   b. Enlargers
   c. Film
   d. Filters
   e. Flash Bulb
   f. Light Meters
   g. Projectors
   h. Screens

2. Cosmetics
   a. Beauty Creams
   b. Compacts
   c. Eye Make-Up
   d. Face Powder
   e. Hair Shampoos and Lotions
   f. Lipstick
   g. Nail and Hand Beautifiers
   h. Perfumes
   i. Rouge

3. Household Appliances and Supplies
   a. Clothes Dryers
   b. Dehumidifiers
   c. Dish Washers
   d. Floor Polishers and Waxes
   e. Freezers
   f. Home Air Conditioners
   g. House Radios
   h. Refrigerators
   i. Sewing Machines
   j. Stoves and Ranges
   k. Vacuum Cleaners
   l. Washing Machines

3. Medicines
   a. Bandages and Adhesive tapes
   b. Cold Medicines
   c. Dental Supplies and Mouth Remedies
   d. Headache Remedies
   e. Laxatives
   f. Liniments
   g. Stomach Pills
   h. Vitamins
1. What is the purpose of a chronological file?

**Purpose**—To call attention to dates and deadlines and data that must be completed at definite intervals. Items requiring attention at some future time will be filed not by name or number, but by action date.

2. What method would you use to set up and keep a chronological file?

**Method**—The follow-up (or chronological) file can be kept in front of a drawer in the regular files; or it can be kept in a tub file, desk tray, or a desk-drawer file. There is a guide and folder for every month and a set of guides and a folder for each day of the month, numbered 1 through 31. Items that require future attention are filed according to a specific month and day.

3. Give four steps you would use in chronological filing.

**FILING Steps**—Filing in the chronological file consists of several quick steps:

1. Determine a follow-up date; note this date on the item by writing, underscoring, or by some other means.

2. Place the item behind the correct monthly guide.

3. If a follow-up is to occur in the current month, file the item in the appropriate day-date file.

4. At the beginning of every new month, items filed originally in the monthly folder are refiled in the daily folder.
CHRONOLOGICAL ARRANGEMENT TEST

Directions: Arrange the following dates in chronological order in the proper columns at the bottom of the page. Work as rapidly as you can.


| to June 30, 1965 to Nov. 30, 1965 to May 10, 1966 |

| to Dec. 15, 1968 to Jan. 2, 1970 and after |

29
<table>
<thead>
<tr>
<th>CHRONOLOGICAL ARRANGEMENT KEY</th>
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<tbody>
<tr>
<td>Jan. 1, 1965 to June 30, 1965</td>
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<tr>
<td>Jan. 1, 1965</td>
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<tr>
<td>March 31, 1965</td>
</tr>
<tr>
<td>April 25, 1965</td>
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<tr>
<td>May 11, 1965</td>
</tr>
<tr>
<td>May 12, 1965</td>
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<tr>
<td>June 4, 1965</td>
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<tr>
<td>June 30, 1965</td>
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<tr>
<td>May 11, 1966 to Dec. 15, 1968</td>
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<tr>
<td>March 19, 1967</td>
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<tr>
<td>April 30, 1967</td>
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<td>June 30, 1967</td>
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<td>Dec. 13, 1968</td>
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