

Instructional Scenario

Filing Documents

Chronologically



Course/Duty Area: Office Specialist III; Managing Records

Scenario:

Susan has been hired part-time to assist with the filing of time-sensitive data for a local law firm. While the work is entry-level only three days a week, it is critical that the updates be processed and filed correctly in the correct volume of manuals and in the correct sequence by time of release. These books are used by law clerks and attorneys in the firm in case research and it is imperative that the pages be filed correctly.

Big Question:

What steps will ensure that the records are updated in correct order and sequence?

Focused Questions:

- How will Susan be trained on the importance of this task?
- What specific skills should Susan or other filing clerks exhibit? (e.g., attention to detail, clear understanding of page number/sequencing)
- In what order will Susan need to arrange the updates to ensure that proper page order and latest updates are included?
- What should Susan do in the instance that a mistake is discovered?
- What disposal plan is in place for the outdated material (Is it necessary to keep the revised page for a certain time in case an error is discovered?)

Project-Based Assessment:

Student will design a step-by-step procedure training document that includes a video example of the work to be accomplished.

Instructional scenario submitted by Dana Dingell, Performance Parts Inc.