

FILING METHODS

FILING CAN BE DONE:

- MANUAL
- ELECTRONIC

TWO TYPES OF FILING SYSTEMS:

- **CENTRALIZED FILING:** This filing system is where all records are in one central location in an office
- **DECENTRALIZED FILING:** This filing system is where filing records are located in different places within the office

POLICIES FOR EFFICIENT FILING

- Put a check on all documents that have been cleared for filing
- Sort and group all papers before filing. You can sort them out by date, alphabetical order, etc.
- Remove all paper clips before placing documents in files
- Try to file daily to avoid an excessive papers to file
- Use Cross Reference Cards when a files is known by more than one name
- When someone borrows a file from the draw, use an absent card to identify that the card was removed.



METHODS OF PAYMENT

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- CHEQUE
 - DEBIT CARD
 - CREDIT CARD
 - STANDING ORDER
 - MONEY ORDER
 - BANK DRAFT
 - CRYPTOCURRENCY (Some businesses accept this form of payment)




CREDIT CARD

- ▶ A credit card is a plastic card bearing an account number assigned to a cardholder with a credit limit that can be used to purchase goods and services and to obtain cash disbursements on credit. It is a loan from the bank, and it carries a higher interest payment.



STOPPING A CHEQUE

- ▶ If you want to stop or cancel a cheque, inform the bank immediately.
 - ▶ You can go into the bank or telephone them, giving the bank the date, cheque number, and the amount.
 - ▶ You can also send a letter to STOP the payment.
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MAKING TRAVEL ARRANGEMENTS

As a Secretary/Administrative Assistant- you will be more than likely required to make travel arrangements. This must be done accurately and efficiently

The objective is that everything must be organized well and properly planned before the person traveling leaves the office.

MAKING TRAVEL ARRANGEMENTS

- ▶ Know the dates of travel
- ▶ Purpose of the visit
- ▶ Know the countries/places to be visited
- ▶ Know the method of travel (Air, Sea, Bus, Train, etc. or combinations)
- ▶ Check for the airline preferences
- ▶ Know the number of persons traveling
- ▶ Appointments/ visits while on the trip
- ▶ Visa
- ▶ Know any travel restrictions

- ▶ Travel advisories
- ▶ Book accommodations
- ▶ Car accommodations
- ▶ Insurances needed
- ▶ Medical requirements

TRAVEL DOCUMENTS INCLUDE

- ▶ Valid passport- Which allows entry into a foreign country
- ▶ Visa- Allows a holder to enter a country for a specified time
- ▶ Immunizations required- to limit catching a disease or spreading it
- ▶ Health insurance- Covers the cost of sickness or if you're injured while abroad
- ▶ Entry permits- These are used in some countries if Passport is lost
- ▶ Tax Clearance Certificates- Ensure taxes have been paid before leaving a country

- ▶ **ITINERARY-** A written detail of travel arrangements in the form of dates, times and destination using the 24 hour clock providing the traveler with information as to where he/she should be, and with who or when.

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SAFETY IN THE WORKPLACE

BEFORE A FIRE

- ▶ Always know where the fire alarm system is located
- ▶ You must know how to activate the system
- ▶ Do you know where the fire extinguisher is? You must know the location of the fire extinguisher
- ▶ Do you know the exit points? You must know the locations of other exits should there be no access to the main exit.

DISCOVERING A FIRE

- ▶ Only rescue victims when it is safe to do so. Do not put yourself in danger.
- ▶ When there is a fire, sound the fire alarm immediately.
- ▶ Close all windows and doors where the fire exists.
- ▶ Make an attempt to use the fire extinguisher.
- ▶ VACATE the building by the closest or nearest exit that is accessible.



WRITTEN COMMUNICATION



TYPES OF WRITTEN COMMUNICATION

- ▶ Business Letter- Formal- This style is used most frequently when sending outside of the office
 - ▶ Memo/Memorandum-informal-used mostly for staff- used frequently as a reminder or a note to persons inside the office.
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