Brandon Tips is a medical assistant who works with his father, Dr. Rick Tips. Brandon has considered continuing his education to become a doctor, but he is not sure whether he would like to be a medical doctor, an orthopedic physician, or a chiropractor. He decided to spend his summer off from college working in his father's family practice so that he can get a closer look at the inner workings of a physician's office.

Brandon has assisted with every procedure in the clinic, including the administrative skills required in the front office. The staff has been impressed with Brandon's ability to do any task, no matter how small, as if it were the most important task in the office. He continuously moves from employee to employee to ask what he can do to help. When the administrative medical assistant working in the front office, Darla Grover, was injured in a car accident and had to be off work for a while, Brandon stepped right in to do her job and quickly learned her duties. His help enabled the office to continue to run smoothly even with one employee absent for several weeks.

Brandon has an excellent command of the English language and types about 60 words per minute. Because he is organized and efficient, he can handle the enormous amount of incoming and outgoing mail with very little assistance from the office manager. He also is able to answer phones and schedule appointments. He speaks clearly and is an expert in customer service. Many of Dr. Tips' patients have known Brandon since he was a small child, and they enjoy seeing him helping in his father's office. The patients and staff alike will certainly miss him once he returns to college.

While studying this chapter, think about the following questions:

- What types of difficulties can arise when a physician's family member works at the office?
- How do professionals' marks help the medical assistant save time?
- What types of impressions could be formed by people who receive mail from a physician's office?
- Explain why any written communication discussed in this chapter should be worded in a professional manner.

LEARNING OBJECTIVES

1. Define, spell, and pronounce the terms listed in the vocabulary.
2. Recognize the elements of fundamental writing skills.
3. Explain the various parts of speech.
4. Name some essential references for the medical assistant's library.
5. Explain how to organize technical information and summaries.
6. Discuss applications of electronic technology in effective communication.
7. List the four common sizes of letterhead stationery.
8. Discuss the differences in the four letter styles.
9. Describe how to compose, proofread, and mail a business letter.
10. Explain the four standard parts of a business letter.
11. Organize technical information and summaries.
12. Discuss the process of developing and the value of keeping a communications portfolio.
13. Discuss how to open, sort, and annotate incoming mail.
14. Explain how to save money when mailing.
15. Describe the proper way to send a fax.
16. Explain how to process incoming mail.
17. Explain how to address an envelope according to the U.S. Postal Service's optical character reader guidelines.
Writing correspondence and mail processing consume a large part of the day of the administrative medical assistant. When asked what skills they must want in an administrative assistant, many physicians specify the ability to spell accurately and to write a good letter. When a physician delegates the responsibility for composing letters or reports with the potential to reflect positively or negatively on the practice, he or she is expressing confidence in the medical assistant’s ability.

Importance of Written Communications

Written communications offer the perfect opportunity for making a good impression on others, but they do not just happen. They require thought, preparation, skill, and a positive attitude. Written communications include original letters, memoranda, replies to inquiries, responses to requests for information, telephone messages, e-mail, transcriptions, orders for supplies, instructions for patients, and a variety of other forms. Communications that are courteous to the reader, correct in content, and concise without being curt are most appreciated. Communication truly is an art as well as a skill. The ability to communicate effectively is extremely important to the administrative medical assistant who wants to succeed and advance his or her career.

Flush: Directly shifting or immediately adjacent, or set even with an edge of a type page or column; having no indentation

Girth: A measure around a body or an item

Grammar: The study of the clauses of words, their inflections, and their functions and relations in the sentence; a study of what is preferred and what should be avoided in inflection and syntax.

International mail: Mail that is sent outside the boundaries of the United States and its territories

Intrinsic (in-tris’ik): Belonging to the essential nature or constitution of a thing; indwelling, inward

Phrases: Groups of words with a specific grammatical function, such as a noun phrase or an adjective phrase

Portfolio: A set of pictures, drawings, documents, or photographs either bound in book form or loose in a folder

Ream: A quantity of paper weighing 20 lb or consisting of, variably, 480, 500, or 516 sheets

Recipient: The receiver of some thing or item

Stationers (sta’shun-ner): Sellers of stationery

Substance number: A number based on the weight of a ream of paper containing 500 sheets

Superfluous (su-per’shuh): Exceeding what is sufficient or necessary

Template: Something that establishes or serves as a pattern

Watermark: A marking in paper resulting from differences in thickness usually produced by the pressure of a projecting design in the mold or on a processing roll; it is visible when the paper is held up to the light

Critical Thinking Application

Brandon has just found a small backlog of correspondence that accumulated during the first 3 days Darnel was out of the office. A large amount of mail comes to the office each day. How can Brandon manage the daily mail and clear the pile of communications that accumulated over those 3 days?

Reflection on the Physician

Each member of the staff must be conscientious about the documents and materials in the office and those that leave it. An envelope addressed carelessly or a patient information sheet that has been photocopied over and over implies that the office staff is not concerned about the appearance of documents that leave the office. If the staff is careless in this respect, many patients assume the staff is careless with everything, including patient care.

Everything that happens in the medical office reflects on the physician or physicians who practice there. Letters with misspelled words or errors give the reader a negative impression of the physician and the practice itself. Great care must be taken to ensure that each document in the office and sent from the office...
### TABLE 13-1 Proofer’s Marks

<table>
<thead>
<tr>
<th>Symbol or Mark</th>
<th>Meaning</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>Strike out</td>
<td>take out</td>
</tr>
<tr>
<td>Close up</td>
<td>Print as if were</td>
<td>print</td>
</tr>
<tr>
<td>Delete and close up</td>
<td>Strike up</td>
<td>strike up</td>
</tr>
<tr>
<td>Insert</td>
<td>Insert a word or phrase</td>
<td>insert word or phrase</td>
</tr>
<tr>
<td>Insert a space</td>
<td>Put space between</td>
<td>put space between</td>
</tr>
<tr>
<td>Space nearly</td>
<td>スペルベナルに</td>
<td>space nearly</td>
</tr>
<tr>
<td>Let stand</td>
<td>Let stand at</td>
<td>let stand at</td>
</tr>
<tr>
<td>Transpose</td>
<td>Change the order</td>
<td>change the order</td>
</tr>
<tr>
<td>Set farther to left</td>
<td>Too far to the right</td>
<td>set farther to left</td>
</tr>
<tr>
<td>Set farther to right</td>
<td>Too far to the left</td>
<td>set farther to right</td>
</tr>
<tr>
<td>Begin a new paragraph</td>
<td>The same as to new conclusion</td>
<td>begin a new paragraph</td>
</tr>
<tr>
<td>Spell out</td>
<td>Write out as fine pounds</td>
<td>spell out</td>
</tr>
<tr>
<td>Set in CAPS</td>
<td>Set out as NATO</td>
<td>set in CAPS</td>
</tr>
<tr>
<td>Set in lowercase</td>
<td>Set out as south</td>
<td>set in lowercase</td>
</tr>
<tr>
<td>Set in italics</td>
<td>Set out as name</td>
<td>set in italics</td>
</tr>
<tr>
<td>Set in boldface</td>
<td>Set out as important</td>
<td>set in boldface</td>
</tr>
<tr>
<td>Superscript or subscript</td>
<td>Superscript as in set</td>
<td>superscript or subscript as in set</td>
</tr>
<tr>
<td>Comma</td>
<td>Regress, and yellow</td>
<td>comma</td>
</tr>
<tr>
<td>Apostrophe</td>
<td>Colon not before</td>
<td>apostrophe</td>
</tr>
<tr>
<td>Period</td>
<td>The end is near</td>
<td>period</td>
</tr>
<tr>
<td>Quotation marks</td>
<td>He said, did he say?</td>
<td>quotation marks</td>
</tr>
<tr>
<td>Parentheses</td>
<td>Run your eye</td>
<td>parentheses</td>
</tr>
</tbody>
</table>

### Grammar Review

Good grammar is essential to the writing of effective, professional business letters. Medical assistants must understand the elements of acceptable grammar and writing skills.

#### Parts of Speech

**Nouns.** A noun is a person, place, or thing. Nouns can also be thoughts, ideas, or concepts, such as freedom or courage. Common nouns name general persons, places, or things (e.g., doctor and city). Proper nouns are specific (e.g., such as Mrs. Adams and New York City).

**Pronouns.** Pronouns replace nouns and provide the writer with shorthand so that proper nouns do not have to be repeated constantly. Pronouns include words such as it, you, he, she, him, them, mine, yous, yours, its, ours, and theirs.

**Verbs.** Verbs are action words that express movement, such as run, drive, or type. Linking verbs express a condition or state of being: they include is, am, are, was, be, and been. Linking verbs also express the senses, as in smell, hear, taste, touch, feel, and look.

**Adjectives.** Adjectives can describe nouns and pronouns, or they may show which one, how many, and what kind of A, an, and the are special types of adjectives called article. Examples of adjectives include a golden sunset, a playful dog, and a crooked nose.

**Adverbs.** Just as adjectives describe nouns, adverbs describe verbs, adjectives, or other adverbs. Adverbs specify when, where, to what extent, or how. Examples include unusually warm, never, and quite cold.

**Prepositions.** Connecting words that show a relationship between nouns, pronouns, or other words in a sentence are called prepositions. Examples of prepositions include by, from, to, in, at, with, for, and on.

**Conjunctions.** Conjunctions join words or phrases. These helpful words include and, or, nor, and but.

**Interjections.** Interjections show strong feeling. They are often followed by an exclamation point and sometimes by a comma. "Ouch! That really hurts!" is a sentence that uses an interjection.

### Writing Skills and Composing Tips

All medical assistants must know the fundamental skills of proper business writing. Most business letters should be less than one page long and carefully organized (Procedure 13-1). This takes practice and preparation. Everyone who writes letters develops a personal style.

The medical assistant should carefully read the letter to be answered. Make note of or underline any questions asked or materials requested. Decide on the answers to the questions and verify the information; this is called annotating. Draft a reply, proofread it, and then rewrite for clarity (Procedure 13-2). Keep most sentences short. Put only one idea in each sentence and eliminate superfluous words. Be careful about using medical terms in correspondence with patients. Instead, use language the reader can easily understand.

Most physicians use a highly professional and formal style in their dictation. The medical assistant responsible for composing correspondence for the office should strive for the same degree of formality the physician uses. It would be inappropriate for the assistant to write in a breezy, informal style when acting as the representative of an employer with a more formal approach. The principal point to remember is that every letter produced in your office should project the image of the physician, regardless of who composes or signs the letter.

### Making Sense of Sentences

Sentence structure is important when writing a professional letter or document. Medical assistants should know the basics of good sentence structure so that written documents make sense and represent the medical facility and staff in a positive way.

**Types of Sentences.** The four basic types of sentences are declarative, interrogatory, imperative, and exclamatory. Declara-
TABLE 13-2 One Hundred and Fifty Frequently Misspelled or Misused English Words

<table>
<thead>
<tr>
<th>Absence</th>
<th>Comitate</th>
<th>Inimitable</th>
<th>Persistent</th>
<th>Ridiculous</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accede</td>
<td>Definitely</td>
<td>Inolute</td>
<td>Personal</td>
<td>Sacrilegious</td>
</tr>
<tr>
<td>Accessible</td>
<td>Description</td>
<td>Intricate</td>
<td>Personnel</td>
<td>Seize</td>
</tr>
<tr>
<td>Accommodate</td>
<td>Desirable</td>
<td>Irrelevant</td>
<td>Possession</td>
<td>Separate</td>
</tr>
<tr>
<td>Achieve</td>
<td>Desipe</td>
<td>Irresistible</td>
<td>Proceed</td>
<td>Sige</td>
</tr>
<tr>
<td>Affect</td>
<td>Development</td>
<td>Inhale</td>
<td>Prevent</td>
<td>Similar</td>
</tr>
<tr>
<td>Agglutinate</td>
<td>Disease</td>
<td>Judgment</td>
<td>Predictable</td>
<td>Sizable</td>
</tr>
<tr>
<td>All right</td>
<td>Disapper</td>
<td>Labored</td>
<td>Predominant</td>
<td>Stationary</td>
</tr>
<tr>
<td>Alight</td>
<td>Disappoint</td>
<td>Leisure</td>
<td>Progress</td>
<td>Subpoena</td>
</tr>
<tr>
<td>Analyze (s.)</td>
<td>Disseminate</td>
<td>License</td>
<td>Precedent</td>
<td>Succeed</td>
</tr>
<tr>
<td>Analyze</td>
<td>Dissolute</td>
<td>Liquify</td>
<td>Principle</td>
<td>Suddenness</td>
</tr>
<tr>
<td>Annotate</td>
<td>Discriminate</td>
<td>Maintenance</td>
<td>Principle</td>
<td>Superintendent</td>
</tr>
<tr>
<td>Argument</td>
<td>Dissatisfaction</td>
<td>Maneuver</td>
<td>Privilege</td>
<td>Supervise</td>
</tr>
<tr>
<td>Assistant</td>
<td>Dispose</td>
<td>Miscellaneous</td>
<td>Procedure</td>
<td>Surprise</td>
</tr>
<tr>
<td>Auxiliary</td>
<td>Drunkenness</td>
<td>Mischief</td>
<td>Process</td>
<td>Taff</td>
</tr>
<tr>
<td>Balloon</td>
<td>Ectasy</td>
<td>Mistap</td>
<td>Professor</td>
<td>Technique</td>
</tr>
<tr>
<td>Behave</td>
<td>Effect</td>
<td>Necessary</td>
<td>Pronunciation</td>
<td>Through</td>
</tr>
<tr>
<td>Benefited</td>
<td>Eligible</td>
<td>Newsstand</td>
<td>Psychology</td>
<td>Tranquility</td>
</tr>
<tr>
<td>Brochure</td>
<td>Embarass</td>
<td>Noticeable</td>
<td>Psychology</td>
<td>Transformed</td>
</tr>
<tr>
<td>Bullets</td>
<td>Exceed</td>
<td>Occasion</td>
<td>Pursue</td>
<td>Truly</td>
</tr>
<tr>
<td>Category</td>
<td>Exclamation</td>
<td>Occurrence</td>
<td>Questionnaire</td>
<td>Tyramize</td>
</tr>
<tr>
<td>Changeable</td>
<td>Existence</td>
<td>Oscillate</td>
<td>Rearrange</td>
<td>Unnecessary</td>
</tr>
<tr>
<td>Chastise</td>
<td>Heteronomy</td>
<td>Paid</td>
<td>Recede</td>
<td>Until</td>
</tr>
<tr>
<td>Committee</td>
<td>Forty</td>
<td>Pamphlet</td>
<td>Receive</td>
<td>Vacate</td>
</tr>
<tr>
<td>Comparative</td>
<td>Grammar</td>
<td>Particky</td>
<td>Recommend</td>
<td>Vacuum</td>
</tr>
<tr>
<td>Concede</td>
<td>Gruevous</td>
<td>Parallel</td>
<td>Refining</td>
<td>Vicious</td>
</tr>
<tr>
<td>Conscientious</td>
<td>Height</td>
<td>Paralyse</td>
<td>Repetition</td>
<td>Warrant</td>
</tr>
<tr>
<td>Conscienous</td>
<td>Inconstantly</td>
<td>Passive</td>
<td>Rheumatism</td>
<td>Wednesday</td>
</tr>
<tr>
<td>Cooly</td>
<td>Indispensable</td>
<td>Perseverance</td>
<td>Rhythmetrical</td>
<td>Wed</td>
</tr>
</tbody>
</table>
CHAPTER 13  Written Communications and Mail Processing

PROCEDURE 13-1

Compose Professional Business Letters

GOAL: To compose a professional business letter that conveys information in an accurate, concise manner and is easy to comprehend.

EQUIPMENT and SUPPLIES
- Computer
- Word processing software
- Draft paper
- Letterhead
- Pencil
- Pen or pencil
- Highlighter
- Envelope
- Correspondence to be answered
- Other pertinent information needed to compose a letter
- Electronic or paper dictionary and thesaurus
- Writer’s handbook
- Portfolio and/or templates

PROCEDURAL STEPS
1. Determine the purpose of initiating correspondence or read through any correspondence to be answered and highlight the specific questions that should be addressed.
   PURPOSE: To make sure all the issues raised in the correspondence are addressed or answered.
2. Make any necessary notes on the letter or a copy of the letter. A scrap sheet of paper may be used.
   PURPOSE: To ensure the goals of the correspondence are fulfilled and that relevant information has been identified and included.
3. Prepare a draft of the letter, using good grammar, and save it in the computer.
   PURPOSE: To put the thoughts on paper for later revision and to make the letter easy to understand.
4. Proofread a printed copy of the letter, using proofreader’s marks to make corrections.
   PURPOSE: To see the document as it will look once printed and to speed the process by using proofreader’s marks.
5. Make any necessary corrections.
6. Allow the physician or other interested parties to proofread the letter, if the medical assistant is not the person whose signature will appear at the bottom.
   PURPOSE: To give the physician an opportunity to correct the letter and add thoughts, if desired.
7. Make any final changes, then print the letter on stationery. Allow the person whose name appears at the bottom to sign the letter.
8. Address the envelope using optical character reader (OCR) guidelines and place the letter and any supporting documents inside (see Procedure 13-4 for OCR guidelines).
9. Mail the letter using the correct postage.
   PURPOSE: Using incorrect postage or guessing can delay delivery of the document.

PROCEDURE 13-2

Report Relevant Information to Others Succinctly and Accurately

GOAL: To compose a clearly written, grammatically correct business letter or memo that is easily understood and to eliminate spelling and grammatical errors.

EQUIPMENT and SUPPLIES
- Stationery
- Computer or typewriter
- Correspondence to be answered or notes
- Guide for proofreader’s marks

PROCEDURAL STEPS
1. Scan the letter or memo to be answered or the notes about the correspondence to be written and highlight any questions that should be answered or points to be made.
   PURPOSE: To ensure that the goals of the correspondence are fulfilled and that relevant information has been identified and included.
2. Write the letter or memo using good grammar.
3. Print a draft copy of the letter or memo. Read it carefully and highlight changes to be made or note any additions to be made. Use proofreader’s marks.
4. Revise the letter or memo once again on the screen. Perform spelling and grammar checks if those tools are available on the computer.
   PURPOSE: To locate any missed errors or misspelled words.
5. Print a final draft. Read the letter word for word and check once again for errors.
6. Have another person proofread correspondence that is especially important.
   PURPOSE: Often another person can find missed errors quickly.
7. Complete the final preparations for mailing the letter or distributing the memo. Address the letter using guidelines for OCR and fast processing at the post office.
   PURPOSE: Reading a hard copy of a letter or memo is more conducive to finding errors and grammatical mistakes.
These are also called run-together or fused sentences. The office was clean when the staff left on Friday the doors were locked.

A comma splice is a sentence in which a comma alone joins independent clauses. The storm grew worse, it began to snow.

**Personal Tools**

Competent handling of written communications requires a basic knowledge of composition. A personal reference library that includes an up-to-date standard dictionary, a medical dictionary, a composition handbook, an English language reference manual, and a thesaurus is a tremendous help.

Those who have difficulty with spelling should keep a small, loose-leaf, indexed notebook or card index of troublesome words. If you need to look up the spelling of a word in the dictionary, record the word in the notebook or card index for quick reference. The physician or a medical assistant familiar with the practice might compile a basic list of frequently used medical terms and abbreviations as a reference.

**Equipment and Supplies**

To create a favorable impression with letters, the medical assistant must use good equipment and high-quality supplies. Regardless of the kind of equipment available, the medical assistant is responsible for knowing how to use it to the best advantage and how to keep it in good working condition. If the equipment manual is available, study it and keep it handy for reference when problems occur. Know how to maintain equipment so that the effort invested in composing correspondence has a high-quality appearance.

**Computers**

Computer applications and electronic technology have made all types of communication easy, efficient, and effective. Various letters and documents can be saved and reused after time. By changing the name and the basic information in the text, Computers can add graphics to text, compact figures, and use multimedia in communications, all of which enhance the document's appearance and effectiveness.

**Copiers**

Maintain the copier so that copies are crisp and clear. The toner cartridge must be replaced or rephoned when necessary, and this can be expensive. Multiple copies of documents usually are made on a copier rather than printed from the computer.

**Scanners**

Occasionally documents are scanned and sent by e-mail. Scanners provide high resolution and can produce images of written text and photos. Scanners are often used to create images so that older documents can be stored.

**Printers**

Printers that function only as printers are available and quite inexpensive; however, most medical offices can benefit from an all-in-one printer. These machines print, fax, copy, and scan laser-quality documents. Many all-in-one printers available today have advanced features, such as lab-quality photo printing, printing on both sides of the pages, and wireless connectivity.

**Critical Thinking Application 13-2**

Brandon realizes that his father's office does not have a method of logging letters sent by certified mail. This poses the exception of a 'dry through a patient's file to determine whether certified mail was actually sent and the notice of delivery received. How can this issue be resolved?

**Continuation Pages.** The second and continuing pages of a letter are placed on plain bond that matches the letterhead in weight and fiber content. These are called continuation pages. The stationery used for continuation pages should exactly match the letterhead but should not have the letterhead printing. Using different paper for the continuation pages is considered unprofessional.
CHAPTER 13  Written Communications and Mail Processing

- No. 10
- No. 6½
- Window

No. 10 envelopes are the general business size used for letter and legal stationery. No. 6½ envelopes and window envelopes often are used for announcements.

**LETTER STYLES**

A business letter usually is arranged in one of three styles: block, modified block or standard, or modified block indented. A fourth style, simplified, occasionally is used. The block and modified block styles are most commonly used in the physician’s office.

**Block Letter Style**

When the block letter style is used, all lines start flush with the left margin (Figure 13-1). This style is considered the most efficient but is less attractive on the page.

**Modified Block Letter Style**

In the modified block style, the date line, complimentary closing, and typed signature all begin at the center. All other lines begin at the left margin (Figure 13-2).

**Modified Block Letter Style with Indented Paragraphs**

The modified block letter style with indented paragraphs is identical to the block style except that the first line of each paragraph is indented five spaces (Figure 13-3).

**Simplified Letter Style**

In the simplified letter style, all lines begin flush with the left margin (Figure 13-4). The salutation is replaced with an all-capital subject line on the third line below the inside address. The body of the letter begins on the third line below the subject line. The complimentary closing is omitted. An all-capital typed signature is entered on the fifth line below the body of the letter.

**Types of Punctuation for Letter Styles**

Traditionally the punctuation pattern used is based on the letter style. Normal punctuation is always used in the body of a business letter. In the other parts, either standard or open punctuation is used.

When standard punctuation is used a colon is placed after the salutation, and a comma is placed after the complimentary closing. This is the punctuation pattern most often used, and it is appropriate with the block or modified block letter styles. When open punctuation is used, no punctuation is used at the end of any line outside the body of the letter unless that line ends with an abbreviation. This pattern is always used with the simplified letter style.

**SPACING AND MARGINS**

Generally, centering a letter on the page is the most attractive presentation. This is easily done with computer programs, such as Microsoft Word or WordPerfect. Business letters almost always are single spaced. If a letter consists of only a few lines, double-space both the inside address and the message and indent the first line of each paragraph five spaces.

The first typed entry, which is the date on the first page of the letter, usually is placed on the third line below the letterhead or on line 13 if the paper has no letterhead. The typing on continuation pages begins 1 inch from the top.

On standard letterhead, the side margins are usually 1 to 1½ inches on each side. If a letter is very short, making the margins wider creates a better appearance.

---

**Figure 13-1** block letter style.

Elizabeth Blackwell, M.D.
233 Orange Avenue, N.W.
Cottonwood, UT 84121

January 26, 19—

Mr. Richard Fluege
3078 North Willow Avenue
Palm Beach, FL 33460

Dear Mr. Fluege:

Please send me full particulars on the professional suites you expect to offer for sale or rent in the Medical Arts Professional Annex.

In about six months, I will be ready to open my practice, and I am interested in locating in Florida. My preference is a street-level suite of approximately 2,000 square feet.

After I have had an opportunity to study the information you send me, I will write or telephone you if I have further questions.

Very truly yours,

Elizabeth Blackwell, M.D.

8/3/91
A 1-inch margin is the minimum at the bottom of the page. This can be increased if the letter will be carried over to a second page. Never use a second page to type only the complimentary closing and signature. Carry over a minimum of two lines of the body of the letter onto a continuation page. The heading of continuation pages is single-spaced.

**THE PARTS OF A LETTER**

The structure of a letter and its placement on the page have been fairly well standardized into the four main parts:

- **Body**
- **Closing**

### Heading

The heading includes the letterhead and the dateline. The printed letterhead usually is centered at the top of the page and includes the name of the physician or group and the address. It may include the telephone number and the medical specialty or specialties. In a group or corporate practice, the names of the physicians may also be listed. Occasionally, the heading also includes the name of an office manager.

The dateline consists of the name of the month written in full, followed by the day and year. The date should not be abbreviated.
The opening consists of the inside address, the salutation, and the attention line, if one is used. The inside address has two or more lines, starts flush with the left margin, and contains all of the name of the individual or firm to whom the letter is addressed and the mailing address. When the letter is addressed to an individual, the name is preceded by a courtesy title, such as Dr., Mr., Mrs., Miss, or Ms. When addressing a letter to a physician, omit the courtesy title and type the physician's name, followed by his or her academic degree, such as Dr. Rick P. Tippis, MD. The name also could be written as Dr. Rick P. Tippis. However, do not use both a courtesy title and a degree that means the same thing, as in Dr. Rick P. Tippis, MD. Although this construction is often seen, even on the sign in front of physicians' offices, writing a doctor's name in this way is incorrect.

The salutation is the letter writer's introductory greeting to the person being addressed; it is typed flush with the left margin on the second line below the last line of the address and is followed by a colon unless open punctuation is used. The words in the salutation vary, depending on the letter's degree of formality.

The attention line, if used, is placed on the second line below the inside address. If the medical assistant knows the name of the person for whom the letter is intended, that person's name is used in the inside address, and he or she is addressed personally. If the letter is addressed to a company or organization and directed to a division or department, the division or department name is placed on the attention line.

The body of a letter includes the subject line, if one is used, and the message. In medical office correspondence, the subject of a letter frequently is a patient; in that case, the patient's name is used as the subject line or may be noted with the abbreviation "Ref." Because the subject line is considered part of the body of the letter, it is placed on the second line below the salutation. It may start flush with the left margin or at the point of indentation of indented paragraphs, or it may be centered. The word "Subject," followed by a colon, may be used or omitted entirely.

Begin typing the message on the second line below the subject line or on the second line below the salutation if no subject line is used. The first line of each paragraph may be indented five spaces, or it may start flush with the left margin, depending on the letter style chosen.
Closing
The closing includes the complimentary closing, the typed signature, the reference initials, and any special notations.

The complimentary closing is the writer's way of saying goodbye. This closing is placed on the second line below the last line of the body of the letter and is followed by a comma unless open punctuation is used. Only the first word is capitalized. The words are determined by the degree of formality in the salutation. For example, if the salutation is Dear Herb, the closing might be Cordially. Very truly yours, or Sincerely yours, with consistent punctuation. If the letter is addressed to a business, the complimentary closing most often used is Sincerely.

A typed signature is a courtesy to the reader, especially if the name does not appear on the printed letterhead or if the personal signature is difficult or impossible to decipher. The typed signature is placed on the fourth line directly below the complimentary closing.

Reference initials that identify the writer and typist are placed flush with the left margin on the second line below the typed signature. If the writer's name is included on the signature line, the writer's initials need not be included in the reference block unless desired. The writer's initials, if used, should precede the typist's initials and are separated by a colon or diagonal line: GBrenes (writertypist) and GBRowe (writertypist).

Special notations sometimes are needed to indicate that enclosures are included with the letter or that copies of the letter are being distributed to others. If the letter has an enclosure, type the word Enclosure or Enc: on the first line below the reference initials. If more than one enclosure is involved, specify the number (e.g., Enclosures 3) or the name of the actual enclosure (e.g., map or brochure). If copies are to be sent to others, type this notation in the same manner as the enclosure notation or after it if both notations are needed. The copy notation usually is written as cc: or cpy: or followed by the name or names of those to whom a copy will be sent. If the person to whom the letter is addressed is not to know that copies are being distributed to others, use the notation bc: for "blinded copy" on all copies except the original.

Place the notation either in the upper left of the letter at the margin or below the last notation at the lower left margin.

Postscripts
Although a postscript sometimes may be used to express an afterthought, it often is used to emphasize an idea or statement. Begin the postscript on the second line below the last special notation. Follow the style of the letter, indenting the first line if paragraphs were indented in the body of the letter or starting at the margin if indentation was not used in the letter.

Continuation Pages
If the letter requires one or more continuation pages, the heading of the second and subsequent pages must have three items:
- Name of the addressee
- Page number
- Date

The heading should begin on the seventh line from the top of the page. Continuation of the body of the letter begins on the seventh line or the third line below the heading. The three accepted items for the continuation page heading are:
RICK P. TIPPS, M.D.
Page 2
July 5, 2010
Rick P. Tipps M.D.
Page 2
July 5, 2010
Subject: Susan Clemmons
Rick P. Tipps, M.D.
- July 5, 2010

Signing the Letter
Some physicians prefer to compose and sign all letters that leave their offices. However, most are more than pleased to delegate the responsibility of composing and signing business letters to a competent assistant. Although not all authorities agree on the form to be followed, most recommend that a woman's typed signature include a courtesy title (Miss, Mrs., or Ms.) and that the title not be enclosed in parentheses. The courtesy title need not be included in the handwritten signature.

In general, the physician signs all of the following:
- Letters dealing with medical advice to patients
- Letters to officers or committees of the medical society
- Referral and consultation reports to colleagues
- Medical reports to insurance companies
- Personal letters

The medical assistant usually composes and signs letters concerning the following:
- Routine matters (e.g., arranging or rescheduling appointments)
- Orders for office supplies
- Notification to patients about surgery or hospital arrangements
- Collection of delinquent accounts
- Letters of solicitation

CRITICAL THINKING APPLICATION 13-4
One of the employees has brought an urgent letter to Brandon that Brandon's father neglected to sign before leaving the office for the day. The letter is to another physician reporting his findings on a referred patient. The employee asks Brandon to sign the letter. What should he do? What are some ways to resolve this situation if the letter must leave in the mail today?

OTHER TYPES OF WRITTEN COMMUNICATION
"The physician's office must deal with many types of written communications other than business letters. Remember, every piece of written communication that leaves the office reflects on the office. Make sure to follow the rules of grammar even when sending a simple business e-mail.

Telephone Messages
One of the most common types of written communication in the medical office is the telephone message. Seven items must be recorded when a phone message is taken:
• Name of the person to whom the call is directed
• Name of the person calling
• Caller's daytime or cell phone number (if both)
• Reason for the call
• Action to be taken
• Date and time of the call
• Initials of the person taking the call

**E-Mail Messages**

E-mail is a very popular way to send written communications in today’s computer-literate society. E-mail messages can be saved, printed for the patient's chart, and archived for storage. E-mails previous to the patient’s care to a conflictic situation should be printed, and a copy should be placed in the patient's medical record. E-mails that show a pattern of cancelled appointments should also be added to the patient’s medical record. Any e-mail sent in a professional capacity from the physician's office of by a physician’s representative should adhere to proper rules of grammar and should have accurate spelling. People tend to classify e-mail as casual communication, but because it is so frequently used in business, it should be written in the same professional manner as a mailed letter. Use of the proper letter format, including the inside addresses and date, is not necessary. However, the rest of the e-mail should read similarly to a letter. Never send e-mails that use abbreviations such as “r” for “are,” or “u” for “you.” Internet abbreviations of any kind are not acceptable in business communications. Use single spacing and do not use terms or sentences in all-capital letters (e.g., ARE THE TEST RESULTS AVAILABLE?); this implies shouting in e-language.

The medical assistant also should not immediately answer an e-mail that is derogatory, accusatory, or negative in some other way. Print the e-mail and go through it calmly, marking what needs to be addressed. Because attitude often is easily detectable in an e-mail, make sure the response has no hint of negativity.

Once a professional response has been crafted, type and send it. In this situation, best course often is to send a copy to the office manager, either openly or blindly, depending on the situation. This way, the medical assistant includes the supervisor in the conflict and keeps that individual aware of the brewing situation. The office manager can get involved if necessary or just monitor the situation and how the medical assistant handles it.

Realize that e-mails are not guaranteed to be a secure form of communication. Consider the alternatives before sending an e-mail containing privileged or confidential information. Many offices use a disclaimer with their e-mails, such as:

- This e-mail, including attachments, contains information that may be confidential, protected by attorney-client privilege, or exempt from disclosure under applicable law. This e-mail, including attachments, contains nonpublic information intended to be conveyed only to the designated recipient(s). If you are not an intended recipient of this communication, please advise us that any disclosure, dissemination, distribution, copying, or other use of this communication is strictly prohibited. If you have received this communication in error, please notify the sender immediately by reply e-mail and destroy all electronic and printed copies of the communication and any attached documents.

**Critical Thinking Application 13-S**

- E-mail is used more and more often to communicate with employees. Brandon has noticed that some printed memos circulate throughout the office. What are the advantages and disadvantages of communicating through e-mail with employees?
- The office manager has given Brandon information to disseminate to all employees of the clinic. She did not specify whether to give out the memo by hard copy or by e-mail, but she did state that the information was very important. Which would be the best method?

**EDITING**

All documents should go through an editing process before mailing or delivery. First proofread the document and then review it for accuracy in grammar and spelling. Most software programs have spelling and grammar checks, as well as a dictionary and thesaurus. The programs also have an “Find” feature that allows the user to move through the document quickly and locate certain words or phrases that need to be changed. For instance, if a document uses the phrase “paper-based medical record,” using the “Find” feature, each place that the word “paper” occurs can be edited to say “electronic.” Editing also allows the user to keep track of changes in a document and to compare the current version to a previous one.

Users can learn advanced features of the software program used in the medical office by taking courses online or at local...
PROCEDURE 13-3

Prepare a Fax for Transmission

GOAL: To compose and transmit a clearly written, grammatically correct fax that is easily understood, free of spelling and grammatical errors, and sent in a manner that provides for patient confidentiality.

EQUIPMENT and SUPPLIES
- Stereotype
- Computer or typewriter
- Correspondence to be answered or notes
- Guide for proofreader’s marks
- Fax machine or all-in-one device

PROCEDURAL STEPS
1. Determine the information and/or documents that need to be included in the fax transmission.
   PURPOSE: To ensure that the goals of the correspondence are fulfilled and that relevant information has been identified and included.
2. Complete a fax cover sheet to include all the information to be faxed, using good grammar.
3. Print a draft copy of the letter or memo. Read it carefully and highlight changes to be made or note any additions to be made. Use proofreader’s marks.
   PURPOSE: Reading a hard copy of a fax is more conducive to finding errors and grammatical mistakes.
4. Revise the fax using the notes and proofreader’s marks.
5. Read the fax once again on the screen. Perform spelling and grammar checks if those tools are available on the computer.
   PURPOSE: To locate any missed errors or misinterpreted words.
6. Prepare a final draft. Read the fax word for word and check once again for errors.
7. Have another person proofread a fax that is especially important.
   PURPOSE: Often another person can find missed errors quickly.
8. Scan any attachments that might need to be sent with the fax into the computer.
9. Make certain that the medical facility confidentiality statement is included on the bottom of the fax cover sheet.
   PURPOSE: To promote patient confidentiality once the fax arrives at its destination.
10. Send the fax.
11. Document that the fax was sent and received if required by office policy.
   PURPOSE: To have proof that the information was sent via fax and prove that the fax was received at its destination, if the fax machine has this capability.
12. When sending critical information via fax, call the receiving office to make certain that the fax was received. Document the person’s name who verified that the fax and all attachments were received.
   PURPOSE: To provide documentation that information was sent and received.

INTEROFFICE MEMORANDUM

TO: All Staff
FROM: Office Manager
DATE: December 1
SUBJECT: Holiday Schedule

Our entire facility will be closed on December 24, December 25, December 31, and January 1. This office will be open and staffed during the days of December 26, 27, 28, 29, and 30. Assignments will be based on seniority of staff members. Please submit your preferences as soon as possible.

A

MEMO TO: George Walker
FROM: Stanley Barr
DATE: February 8
SUBJECT: Office rental

We are experiencing unexpectedly rapid growth in our business office and will soon need additional space for our increased number of employees. Do you have a larger facility available in this building? If no, I would like to hear from you regarding the location, square footage, and anticipated rental costs.

B

FIGURE 13-5 Examples of memorandum. Memos are intended to be short, specific, and to the point.
community colleges. This extra effort can make editing documents go much faster. The more users know about the program, the more efficient they become in its use. Some programs offer free tutorials on their Web site. Also, textbooks available at local libraries or bookstores often include a tutorial CD that corresponds to lessons in the text. Take advantage of these learning opportunities and show initiative, as well as a willingness to learn.

**DEVELOPING A PORTFOLIO**

Letter composition can be made faster and easier by developing a portfolio of sample letters to suit the various situations that frequently arise. As the physician approves letters, add them to the office portfolio. For instance, suppose a letter is needed for a patient who wants to change an appointment. Compose a letter that is clear, concise, and courteous, and make an extra copy to put in the portfolio. Alternatively, if a computer is used, store the letter on a disk or on the computer's hard drive. Do each time a new kind of letter is written. Soon you will be able to select a letter from the portfolio and change it slightly to suit the current situation.

Templates also can help the medical assistant build a portfolio. A template is a guide or pattern that can be followed to create a new document. Microsoft keeps a wide array of templates on its Web site that can be downloaded to the user's computer and adapted for individual use. New templates are added to the Web site often, and most are available at no cost to the user.

**U. S. POSTAL SERVICE**

The U. S. Postal Service (USPS) is an independent establishment of the executive branch of the U. S. government. The Postal Service has been transformed from messages sent by neighbors in colonial times to an agency dedicated to providing mail service to every single home and business in the United States. Today, many operations can be done online at www.usps.com.

**MAIL PROCESSING**

**Incoming Mail**

Each day a great variety of mail comes into the professional office and must be processed. Common items in the daily mail include:
- General correspondence
- Payments for services
- Bills for office purchases
- Insurance claim forms to be completed
- Laboratory reports
- Hospital reports
- Medical society mailings
- Professional journals
- Promotional literature and samples from pharmaceutical houses
- Advertisements

In large clinics and medical centers, the mail is opened by specially designated people in a central department to speed up this daily task. In the average medical office, however, a medical assistant, often the receptionist, opens the mail using the ordinary letter-opening method.

**Opening the Mail**

Before any mail is opened, the physician and medical assistant should establish the procedure to follow for incoming mail; that is, what letters should be opened and what pieces, if any, the physician prefers to open personally. For example, the physician may prefer to open any communications from an attorney or accountant, even if they are not marked Personal. If you have any doubt about whether you should open an envelope, do not open the items; forward it to the person to whom it is addressed. Even a simple procedure such as opening the daily mail can be done more efficiently if a good system is followed.

**Annotating**

Annotating the mail is an additional service the medical assistant can perform. Read through each letter, underline the significant words and phrases, and note in the margin any action required; this makes taking action on the mail much easier. If the letter needs no reply, code it for filing at this time. A highlighter that does not photocopy may be used for annotating. When mail refers to previous correspondence, obtain this from the file and attach it or a copy. If the patient's chart is needed when replying to an inquiry, pull the chart and place it with the letter.

The medical office should have a specific place for the opened, annotated mail. After sorting, opening, and annotating the mail, place the items the physician will want to see in the established place, with the most important mail on top. Personal mail, of course, remains unopened. If a piece of personal mail addressed to the employer is opened by mistake, fold and replace it inside the envelope and write Opened in error across the outside, followed by the initials of the person who opened it. Use the same procedure with a piece of mail addressed to another office that may have been opened in error. In such cases, resell the envelope with transparent tape and hand it to the mail carrier.

**Responding to the Mail**

In some offices the physician and medical assistant go over the mail together. Once the medical assistant has gained confidence, drafting a reply to most inquiries will be easy. Usually, the physician is very pleased to delegate this responsibility, especially for matters that do not relate to patient care.

Letters of referral from other physicians should be noted carefully so that an answer can be sent after the patient has been seen and the physician can give a report. If considerable time may pass before such information can be sent, a courteous gesture is to write a letter to the referring physician advising that a detailed report will follow. Some physicians send printed cards expressing thanks for referrals; others prefer to write thank you letters to professional colleagues.

**Mail Requiring Special Handling**

**Payment Receipts**

Payments from patients and insurance companies arrive at the office daily. All payments should be separated and recorded...
PROCEDURE 13-4
Receive, Organize, Prioritize, and Transmit Information Expediently

GOALS: To efficiently sort through the mail that arrives daily in the medical office.

EQUIPMENT and SUPPLIES
• Computer
• Draft paper
• Letterhead stationery
• Pen or pencil
• Highlighter
• Staple remover
• Paper clips
• Letter opener
• Scissors
• Transparent tape
• Date stamp

PROCEDURAL STEPS
1. Clear a working space on the desk or counter top.
2. Sort the mail according to importance and urgency:
   • Physician’s personal mail
   • Ordinary first-class mail
   • Checks from insurance companies and patients
   • Periodicals and newspapers
   • All other pieces, including drug samples

PURPOSE: To prioritize the mail for the physician so that the most important issues can be dealt with first.

3. Open the mail neatly and in an organized manner.
4. Stock the envelopes so that they all face in the same direction.
5. Pick up the top one and tap the envelope so that when you open it you will not cut the contents.

PURPOSE: To avoid damaging the envelope’s contents.
6. Open all envelopes along the top edge for easiest removal of contents.
7. Remove the contents of each envelope and hold the envelope to the light to make sure nothing remains inside.
8. Make a note of the postmark when this is important.
9. Discard the envelope after you have checked to see that the message inside has a return address. Some offices make it a policy to attach the envelope to each piece of correspondence until it has received attention.
10. Date-stamp the letter and attach any enclosures.

PURPOSE: The date stamp identifies when the envelope and its contents were received at the office.
11. If an endorse notation is present at the bottom of the letter, make sure the enclosure was included. If it is missing, indicate this on the notation by writing the word “No” and circling it.

PURPOSE: To document that the enclosure or enclosures mentioned in the letter were not found inside the envelope.
12. Organize the mail for transmission to each person, and at the appropriate time, distribute it to the proper individuals.

immediately in the day’s receipts. A payment received on Monday should be recorded on Monday. Most patients consider their cancelled check a receipt; if the patient requests a receipt, one should be mailed. Otherwise, the receipt may be placed in the patient’s chart for delivery on a future office visit.

Drug Samples
Sample drugs and related literature are delivered by pharmaceutical representatives, but they occasionally may arrive by mail. Determine from the physician what types of literature and samples should be saved. Most physicians keep pertinent new samples in a locked sample storage area, along with the accompanying literature for immediate reference. Other drug samples are categorically stored. Drugs should never be tossed into the trash.

Critical Thinking Application 13-6
Brandon notices that Mrs. Attway, a widow and long-time patient of his father’s, sent in a check for $725 for a bill. However, her insurance company had already paid $117 toward the bill. Brandon knows that Mrs. Attway must be very careful with her money and has always paid her bills quickly. The policy of the office is to route the payment through the system, but refund checks are cut only once per month. What should Brandon do in this situation?

Vacation Mail
When the physician is away from the office, a medical assistant generally is responsible for handling all mail. In this circumstance, all pieces should be examined carefully. The medical assistant then can decide how to handle each piece by asking the following questions:

• Is it important enough to warrant phoning or faxing the physician?
• Should it be forwarded for immediate attention?
• Should I answer it myself or send a brief note to the correspondent, explaining that the physician is out of the office and the reply will be delayed a bit?
• Can this wait for attention until the physician returns or would that give the appearance of negligence?

Insurance Information
Insurance information should be put in a predetermined place for handling by the billers. Documents relating to insurance should be passed to the appropriate person immediately to prevent delays and to comply with time limits that might result in the claim going unpaid.
If the medical assistant is unable to contact the physician or forward important mail, he or she should always answer the sender immediately, explaining the delay and requesting cooperation. Instead of forwarding an original piece of mail and risking possible loss, make a copy for forwarding. Then, if the physician misses the letter answered, notations can be made on the copy and the copy can be returned to the office staff for answering, without defacement of the original letter.

When the physician is traveling from place to place, the envelopes for all communications sent to him or her should be numbered consecutively. This helps the physician to determine easily whether any mail has been lost or delayed. If a record is kept of each piece of mail sent out, and its corresponding number, anything that might be lost can be identified and remailed if necessary.

Correspondence that does not require immediate action and that the medical assistant cannot answer until the physician returns should be placed in a special folder marked Requirements; this folder is placed on top of other accumulated mail. Mail the medical assistant can compose but that requires the physician's approval before mailing should be put into another special folder marked For Approval. When the physician returns, these letters can be rapidly checked and signed.

Any letters marked Personal may be acknowledged to the return address on the envelope. The brief acknowledgment should state that the physician is out of town for a certain length of time and will attend to the letter immediately on returning. This acknowledgment also should offer help in any way possible in the meantime.

Discard any mail that ordinarilY would not be brought to the physician's attention. Some promotional literature falls into this category. Make sure mailings from professional organizations are saved.

In rare cases, the entire facility may be closed for a time. In such cases the post office can be contacted to hold mail until the facility reopens. The postal carrier cannot accept an oral request; a formal written request must be made. Never leave mail unattended to gather outside a mailbox or clutter up a doorway in a hall. Far too much money and mail of a confidential nature are sent to physicians' offices to run the risk of mail theft or destruction.

## Outgoing Mail

### Folding and Inserting Letters

Letters are folded and inserted into envelopes in standard ways so that the letter fits properly in the envelope and can be easily removed without damage (Figure 13-6).

**No. 10 Envelope.** Bring the bottom third of the standard-sized letter up and make a crease. Fold the top of the letter down to within about \( \frac{3}{8} \) inch of the creased edge and make a second crease; the second crease goes into the envelope first.

**No. 6½ Envelope.** For a standard-sized letter, bring the bottom edge up to within about \( \frac{3}{8} \) inch of the top edge and make a crease. Then, from the right edge, make a fold a little less than one third the width of the sheet and make a crease. From the left edge, bring the edge to within about \( \frac{3}{8} \) inch of the previous crease. Insert the left-creased edge into the envelope first.

### Window Envelopes

To fold a letter for insertion into a window envelope, bring the bottom third of the letter up and make a crease, then fold the top of the letter back to the crease you made before. The inside address now should be facing forward. This method often is used for mailing statements.

### Addressing the Envelope

**Delivery Addresses.** The USPS attempts to have all mail in standard-sized envelopes read, coded, sorted, and canceled automatically at regional sorting stations where mail can be processed at a rate of more than 30,000 letters per hour. The success of automatic sorting depends on the cooperation of mailers in preparing envelopes in a format that can be read by automatic equipment (P海报ure 13-5).

The Postal Service provides three special sets of abbreviations:

1. **State names:** (1) long names of states, (2) names of cities, towns, and places; and (3) names of streets and roads and general terms, such as University or Institute.
2. **Names:** The information can be obtained from the Postal Service, or a program can be purchased for the computer. When these abbreviations are used, it is possible to limit the last line of any domestic mail address to 27 strokes. The next-to-last line in the address block should have a street address or post office box number.
3. **Address block:** Should start no higher than \( \frac{1}{2} \) inch from the bottom. Leave a bottom margin of at least \( \frac{3}{8} \) inch and left and right margins of at least 1 inch. Nothing should be written or printed below the address block or to the right of it.

The regulations for addressing envelopes were developed mainly for volume mailers with computerized mailing lists (Figure 13-7). Some exceptions are acceptable to the Postal Service and its scanning equipment. For example, the traditional
PROCEDURE 13-5

Address an Envelope According to Postal Service Optical Character Reader Guidelines

GOAL: To correctly address business correspondence so that the mail arrives at the post office and is processed by the U.S. Postal Service as efficiently as possible.

EQUIPMENT and SUPPLIES
- Envelopes
- Computer or typewriter
- Correspondence

PROCEDURAL STEPS

1. Place the envelope in the printer.
2. Enter the word processing program, such as Microsoft Word, and check the tools section for envelopes. The address block should start no higher than 2 1/8 inches from the bottom. Leave a bottom margin of at least 3/4 inch and left and right margins of at least 1 inch. Nothing should be written or printed below the address block or to the right of it.

PURPOSE: To ensure correct placement of the address for accurate reading by the OCR.

3. Use dark type on a light background, no script or italics, and capitalize everything in the address.

PURPOSE: To ensure that the OCR can read the address.

4. Type the address in block format using only approved abbreviations and eliminating all punctuation. If a suite number is to be included, type it above the delivery address on a separate line.

5. Type the city, state, and ZIP code on the last line of the address.

6. No line should have more than 27 total characters, including spaces.

7. Leave a 3/4 x 4 3/8 inch space blank in the bottom right corner of the envelope.

PURPOSE: To allow for bar code scanning (OCS).

8. Mail addressed to other countries includes the city and postal code on the third line and the name of the country on a fourth line.
style of typing an address in lower case with initial capital letters can be read by the optical scanners. Also, if the ZIP code cannot fit on the line with the city and state, it can be placed on the line immediately below. When a suite number is used, most people place it after the delivery address, which is fine. However, if it does not fit in that space, it should be placed above the delivery address, not below it.

**Return Addresses.** Always place a complete return address on the envelope. If the envelope is mailed without a stamp or if the stamp fails to come off and the envelope has no return address, it will go to the dead letter office. There, postal employees open the mail to try to identify the sender, but huge delays may make the mail useless on delivery. If an address is found for the sender, the mail is returned in an official envelope with a notice of postage due. If an address is not found for the sender, the mail is destroyed.

**Notations.** Any notations on the envelope directed to the addressee (e.g., Personal or Confidential) should be typed and underlined on line 9 or on the third line below the return address, whichever is lower. Align it with the return address on the left edge of the envelope.

Any notations directed to the Postal Service (e.g., special delivery or certified mail), should be typed in all capital letters on the upper right side of the envelope immediately below the stamp area. If an address has an attention line, it should be typed above the organization line or on the line immediately above the street address or post office box number.

### Sealing and Stamping Hints

When many envelopes need to go into the mail at one time (e.g., at statement time), the process can be speeded up by sealing several at a time:

- Fan out unsealed envelopes, address side down, in groups of six to 10.
- Draw a damp sponge over the flaps, and starting with the lower piece, turn down the flaps and seal each one. Do not use too much moisture, because this may cause the glue to spread and several envelopes to stick together. A similar process simplifies stamping several letters at one time if a postage meter is not used. If possible, purchase stamps by the roll. Tear off about ten stamps from the roll. Fanfold the stamps on the perforations so that they separate easily. Fan the envelopes address side up. Starting at one end of the fanned envelopes, attach the stamp at the end of the strip, tear it off, and proceed to the next envelope. Automated sealers and stampers are also available to make this procedure easier and more efficient.

### Additional Tips

- **At least 10-point type**
- **One space between city and state**
- **Two spaces between state and ZIP code**
- **Simple type fonts**
- **Left justified format**
- **Black ink on white or light paper**
- **No reverse type (white printing on a black background)**
- **If the address appears inside a window, make sure at least 1/8-inch clearance is present around the address. Sometimes parts of the address slip out of view behind the window, and the mail processing machines cannot read the address.**
- **If address labels are used, make sure no important information is cut off. Also make sure the labels are on a straight. Mail processing machines have trouble reading crooked or slanted information.**

### More Tips

- **Always put the attention line on top; never below the city and state, or in the bottom corner of your mail piece.**
- **If the suite or apartment number cannot fit on the same line as the delivery address, put it on the line above the delivery address, not on the line below.**
- **Words such as "east" and "west" are called directions, and they are very important. A missing or bad directional can prevent the mail from being delivered correctly.**
- **Use the free ZIP code lookup and the ZIP+4 code lookup on the Postal Service Web site to find the correct ZIP codes and ZIP+4 codes for the addresses.**
- **Almost 25% of all mail pieces have something wrong with the address, such as a missing apartment number or a wrong ZIP code. Some of these mail pieces may be delivered despite the incorrect address, but it costs the Postal Service time and money.**
- **If a first-class mail letter weighs 1 ounce or less and the address is parallel to the shortest side, the piece may be nonmachinable and will be charged the nonmachinable surcharge.**
- **Sometimes it is not important that the mail piece reach a specific customer, just that it reach an address. One way to do this is to use a generic title such as "Postal Customer" or "Occupant" or "Resident," rather than a name, plus the complete address.**
- **Fancy fonts, such as those used on wedding invitations, do not read well on mail processing equipment. Fancy fonts look great on the envelopes, but they may slow down the mail.**
- **Use common sense. If you cannot read the address, the automated mail processing equipment cannot read the address, either.**
- **Some types of paper interfere with the machines that read addresses. The paper on the address side should be white or light in color. No patterns or prominent flecks, please! Also, the envelope shouldn't be too glossy, avoid shiny, coated paper stock.**

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**BASIC U.S. POSTAL SERVICE DELIVERY ADDRESS GUIDELINES**

- **Always put the address and the postage on the same side of the mail piece.**
- **On a letter, the address should be parallel to the longest side.**
- **Use the following:**
  - All capital letters
  - No punctuation

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Adapted from the U.S. Postal Service Web site: www.usps.com
Cost-Saving Mailing Procedures

Using ZIP Codes. The ZIP code is a very important part of an address, just as the area code is a very important part of a telephone number. ZIP codes start with the number 0 on the East Coast and gradually become higher, up to number 9, on the West Coast and in Hawaii.

The five-digit ZIP code was introduced in 1961. The first three digits identify a major city or distribution point, and all five digits identify an individual post office, zone of a city, or other delivery unit. The Postal Service later developed the nine-digit ZIP code, consisting of the original five digits followed by a hyphen and four additional digits that further identify the addressee's street location. The ZIP code is transformed electronically into a bar code. The office computer may have this capability. The Postal Code claims that the ZIP-plus-4, when used with the automated letter-sorting machinery, can eliminate 20 mail-handling steps and result in considerable savings. These savings are passed on to bulk mailers on mailings of 250 or more pieces that have typed addresses in machine-readable format along with the nine-digit ZIP code.

Presorting. Bulk mailers can get a discount on postage for presorting their mail. A discounted presort rate is charged on each piece that is part of a group of 10 or more pieces sorted to the same five-digit code or a group of 50 or more pieces sorted to ZIP codes with the same first three digits. The USPS uses the words "presorting" and "bulk" interchangeably.

Using Correct Postage. Although mailing fees are still one of our better bargains, the mailing costs for even a small office are a sizable item in the annual budget, and carelessness can cause them to soar. If the facility does not have a postage meter that dispenses postage exactly, make sure you are not putting too many stamps on your outgoing mail. Use an accurate postage scale and remember that only the first ounce requires the base rate; additional ounces are charged at a lower rate. Also remember, the USPS does not deliver mail without postage.

Getting Faster Mail Service

Postage Meters. A postage meter is the most efficient way of stamping the mail in a large business office. It can print postage onto adhesive strips, which are placed on envelopes or packages, or it can print the postage directly onto an envelope. Metered mail does not have to be canceled or postmarketed when it reaches the post office. This means that it can move on to its destination more quickly.

CRITICAL THINKING APPLICATION 13-7

- Brandon knows the mail processing would go much faster if the office invested in a postage meter. The office manager states that he has mentioned this to Brandon's father several times, but he does not purchase a meter. How might Brandon approach his father about this issue?
- What should Brandon do before discussing the postage meter with his father?

Mailing Practices. For large mailings, local letters should be separated from out-of-town letters. Letters or packages that need to be rushed should be taken directly to the post office for mailing. Others can be placed in street boxes or the building's mail chute for pickup. Packages should always be taken to a post office and weighed for proper postage. Place a letter tray on your desk or in some other convenient place so that all outgoing mail is kept together until it is ready to leave the office.

Classifications of Mail

Mail is classified according to type, weight, and destination. The ounce (oz) and the pound (lb) are the units of measurement. Domestic mail is sent to a destination within the United States and its territories; international mail is sent to a destination outside the United States. Letters to distant points of the globe are in almost all cases sent by air and can be expected to reach their destination within a few days. The rates for international mail are based on increments of $1 to 1 ounce. A table of rates can be obtained from the post office.

Express Mail. Express Mail is available 7 days a week, 365 days a year for items weighing up to 70 lb and measuring up to 108 inches in combined length and girth. This includes delivery on Sundays and holidays to most locations. It is the fastest mail service offered by the USPS. Service features include:

- Noon delivery between major business markets
- Merchandise and document reconstruction insurance
- Express mail shipping containers
- Shipment receipt
- Optional return receipt service
- Optional collect on delivery (COD) service
- Waiver of signature option
- Collection boxes
- Optional pickup service
- Automatic insurance up to $100 free of charge

First-Class Mail. First-class mail comprises sealed or unsealed handwritten or typed material, such as letters, postcards, and business reply mail. Postage for letters weighing 3 oz or less is based on weight, in 1-oz increments. Envelopes larger than the standard No. 10 business envelope should have the green diamond border to expedite first-class delivery. The minimum quantity to mail at discount prices is 500 mail pieces. First-class mail over 13 oz automatically becomes Priority Mail. At the time of this publishing, first-class stamps cost 44¢ cents. Postage rates usually are adjusted each May, although rates do not necessarily increase for all services annually.

The forever stamp, first issued by the USPS in 2007, is used at first-class postage on envelopes weighing 1 oz or less. Regardless of postal rate increases and no matter the original purchase price, the forever stamp will always be valid for first-class mail.

Priority Mail. First-class mail weighing more than 13 oz is classified as priority mail, and the postage is calculated on the basis of destination and weight (maximum of 70 lb). Remember these tips about priority mail:

- If using an envelope or box not purchased from the USPS, make sure to mark it Priority Mail.
- Priority mail drop shipment is a special way to get mail delivered sooner. Sacks or trays of standard mail are sent to the post office nearest the zip code for delivery and then sent by standard mail.
- Priority mail parcels weighing more than 15 lb and larger than 84 inches in combined length and girth are charged a balloon rate.

**Standard Mail.** Standard mail consists of advertising, promotional, directory, or editorial material (or any combination of such materials). It must be securely bound by permanent fastenings such as staples, spiral binding, glue, or stitching and cannot have the nature of personal correspondence. Loose-leaf binders and similar fastenings are not considered permanent. Mail in this class cannot weigh more than 15 lb.

**Media Mail.** Media mail is used for books, films, manuscripts, printed music, printed test materials, sound recordings, play scripts, printed educational charts, loose-leaf pages and binders consisting of medical information, videotapes, and computer-recorded media such as CD-ROMs and diskettes. Media mail cannot contain advertising or weigh more than 70 lb.

**Business Mail.** Businesses may want to consider the benefits of using business mail to acquire new customers and retain current customers and develop new services for them, as well as fill orders, and complete transactions. Research business mail options on the USPS Web site.

**Nonprofit Mail.** Nonprofit organizations are eligible for additional mail discounts. Look for more information on the USPS Web site.

**Special Services.**

**Insured Mail.** Insurance coverage against loss or damage is available for Priority Mail, first-class mail, and parcel post.

**Registered Mail.** Mail of all classes, particularly that of unusually high value, can be additionally protected by registering it. The sender may request evidence of its delivery. Registering a piece of mail also helps to trace delivery if necessary. A registered letter is sent by going to the post office and completing the required forms. All articles to be registered must be thoroughly sealed with USPS tape; cellophane tape is not permitted. On receiving the item, the recipient must sign a form acknowledging delivery. A registered letter may be released to the person to whom it is addressed or to his or her agent. For an additional fee, a personal receipt may be requested (Figure 13-8).

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**Figure 13-8:** Delivery receipts for certified mail, Registered Mail, and insured mail. Attach to the back of the envelope and enclose the front with the piece when sought requested adjacent to the article number.
This insures that the letter is released only to the individual to whom it is addressed. Such pieces bear the label 'To Addressor Only. Registered mail can be insured for up to $25,000.

Registered mail is tracked by number from the time of mailing until the time of delivery and is transmitted separately from other mail under a special lock. In case of loss or damage, the carrier may be reimbursed up to certain limits, provided the value of the registered article was declared at the time of mailing and the appropriate fee was paid.

Postal Money Orders. Postal money orders are a convenient way to mail money, especially for a person who does not have a personal checking account. Domestic money orders may be purchased in amounts as high as $1,000.

Special Delivery. Mail of any class that has been marked special delivery is charged at the special-delivery rate. Such pieces may be regular first- or second-class, registered, insured, or COD pieces. The special-delivery designation generally does not speed up the normal travel time between two cities but does ensure immediate delivery of the item when it arrives at the designated post office.

Special Handling. Third- and fourth-class mail sent by special handling receives the fastest service and ground transportation practicable, about the same as for first-class mail. A special-handling fee is charged in addition to the required postage and is determined by weight. This fee does not include insurance or special delivery at the destination; special delivery, if desired, is available at an added cost. If a parcel is sent by priority mail, special handling offers some additional advantage because the mail already is traveling as quickly as possible.

Certified Mail. Any piece of mail without intrinsic value and on which postage is paid at the first-class rate will be accepted as Certified Mail. Items that should be certified include contracts, deeds, mortgages, bank books, checks, stamps, insurance policies, money orders, and birth certificates; these are not themselves valuable but would be difficult to duplicate if lost. Certified mail often is used to aid debt collection.

Regular postage in addition to a certified mail fee must be affixed. For an additional fee, a receipt verifying delivery can be requested (Figure 13-9). Certified mail can be sent special delivery if the prescribed fee is paid. A record of delivery of certified mail is kept for 2 years at the post office of delivery; however, no record is kept at the post office of origin. Furthermore, this type of mail does not provide insurance coverage.

The medical assistant should keep a supply of Certified Mail forms and return receipts on hand. These may be obtained at any post office. Full instructions are included on the forms. Fees and postage may be paid using ordinary postage stamps, meter stamps, or permit imprints. Certified mail can be mailed at any post office, station, or branch or can be deposited in mail drops or in street letter boxes if specific instructions are followed.

Certificate of Mailing. If a vendor needs proof of mailing but is not especially concerned with proof of receipt of an item, the most economic method is to obtain a certificate of mailing. Obtain this form at the post office and fill in the required (information). Attach a stamp for the current fee and hand the form to the postal clerk along with the piece of mail. The clerk will postmark the receipt, initial it, and hand it back as acknowledgment of having received the piece of mail at the post office. This is sometimes used when mailing tax returns or other items that must be postmarked by a certain date.

Private Delivery Services
Not all mail is delivered by the USPS. Actually, the USPS delivers only about 44% of the mail in the United States. Many private services pick up and deliver mail overnight. Among these are FedEx, United Parcel Service, Emery, Airborne Express, and DHL. These services are highly advertised and competitive. All large cities and many smaller communities have centralized points where packages can be dropped off for the service of the sender's choice. Pickup service also is available in many communities.
Handling Special Situations
Forwarding and Obtaining a Changed Address. If a piece of mail is marked Forwarding Service Requested, the post office will forward mail to the new address if it is sent within 12 months of the change or if the receiver has left a forwarding order with the post office. At that time, the forwarding order expires unless the receiver requests that it be continued. Between 12 and 18 months, the piece is returned to the sender with the new address noted. After 18 months, mail usually is returned with the reason for nondelivery noted. Forwarding is free when priority or first-class mail is used.

If the mailer wants to know an addressee’s new address, this service can be obtained from the post office by placing the words Address Correction Requested beneath the return address on the envelope. This can be handwritten, stamped, typed, or printed. The new address is noted on a sticker and returned to the sender. This service has no charge if the item is sent priority or first-class mail. The post office charges a weighted fee for this service for standard mail and packages. If the envelope is marked Change Service Requested, the post office stores the piece of mail and returns a card to the sender showing the forwarding address of the addressee. If the piece was sent priority or first-class, no charge is incurred for the service unless the notification is sent electronically, which involves a small charge.

Recalling Mail. If a letter has been dropped in the mailbox by mistake, do not ask the mail collector to give it to you; he or she is not permitted to do so. However, mail can be recalled by making written application at the post office, together with an envelope addressed identically to the one being recalled. If the letter has already left the local post office, the postmaster, at the sender’s expense, can notify the postmaster at the destination post office to return the letter. However, there is no guarantee that the letter will be retrieved.

Returned Mail. If a letter is returned to the sender after an attempt has been made to deliver it, it cannot be mailed again without new postage. It is best simply to prepare a new envelope with the correct address, affix the proper postage, and place it in the mail.

When mail is returned to the medical office, be sure to correct the database, indicating that mail to a certain patient has been returned, so that postage is not wasted sending mail to that address again.

Tracing Lost Mail. Receipts issued by the post office, whether for money orders, registered mail, certified mail, or insured mail, should be retained until receipt of the item has been acknowledged. If no acknowledgement of receipt for such mailing arrives after an adequate interval, notify the post office to trace the letter or package. Regular first-class mail is not easily traced, but the post office makes every attempt to find it. In tracing a lost letter or package, the post office requires that a special form be filled out; information from any original receipt should be written on this form, along with any other identifying information.

Using Mail Merge
The Mail Merge feature in Microsoft Word is a useful way to create a group of documents that are similar in text but have unique identifying features. For instance, the physician wants to send a letter to all the patients informing them that the office is moving to a new address. However, the physician wants to personalize the letters rather than sending the same one with the greeting, “Dear Patients,” Mail Merge can help the user create a set of letters, e-mails, and faxes, a set of labels and envelopes, or numbered items, such as tickets or coupons. Many assume that Mail Merge is very complicated, but the steps actually are quite easy to follow.

Using Mail Merge in Microsoft Word
Step 1. On the Tools menu, point to Letters and Mailings, and then click on Mail Merge.
Step 2. Under Select Document Type, click Letters. (The active document now becomes the main document.)
Step 4. Set up and display the letter. Click Next and then Select Recipients.
Step 5. Locate or create a data source, and then select the recipients. Then, click OK to return to the Mail Merge task pane.
Step 6. Click Next: Write your letter.
Step 7. After completing the main document and inserting all of the merge fields, click Save As on the File menu. Name the document and click Save.
Step 8. Click Next: Preview your letters.
Step 9. Click Next: Complete the Merge.
Step 10. Print the letters or save the merged letters for later use.

Closing Comments
Remember that every document sent from the medical office should project a professional image. Use neat handwriting when correspondence is not computer generated. All the office staff must be able to read items written years ago. It is worth the time and effort to brush up on English skills so that writing documents becomes as comfortable as setting an appointment or assisting in a procedure.

Patient Education
Medical offices often use brochures and printed material to educate their patients. It is critical that these materials look professional and reflect a positive image of the physician and the facility. Make sure copied material is clean, has no wrinkles, and is attractively presented. If the information was written by an office staff member, make sure correct grammar has been used and that several office members proofread the work for errors and proper use of the English language.

Legal and Ethical Issues
Keep copies of all communications leaving the office that relate to patient care. If any information is handwritten, it must be completely legible to the patient. As always, every document containing patient information must be treated as strictly confidential.
SUMMARY OF SCENARIO

Brandon has been a tremendous help to the office staff over the summer months. He has learned about every area of the medical clinic and has mastered several of the office procedures, both clinical and administrative. He has a greater understanding now of the business aspect of the medical office.

His duties as a temporary administrative medical assistant have opened his eyes to the value and importance of administrative personnel. He can easily see that everyone, from the receptionist to the scheduler to the insurance billing, plays a vital role in the smooth operation of the facility.

Toward the end of the summer, the office staff honors Brandon with a going-away party. He announces with a smile that he has decided he wants to become a pediatrician, based on his experience in his father’s family practice. He tells the staff he plans to leave them all away from his father! Then, on a serious note, he thanks all the employees for their patience and for their willingness to let him learn from them. Everyone expects Brandon to be a complete success.

SUMMARY OF LEARNING OBJECTIVES

1. Define spell, and pronounce the terms listed in the vocabulary.
   Spelling and pronunciation of medical terms correctly builds the medical assistant’s credibility. Knowing the definition of these terms promotes confidence in communication with patients and co-workers.

2. Recognize the elements of fundamental writing skills.
   The medical assistant must be able to write general business letters, memos, meeting minutes, and various other documents necessary in the physician’s office. The needed skills include spelling, grammar, basic sentence structure, and the parts of speech that make up a complete sentence. These fundamental writing skills apply not only to letters, but also to notes, reports, and all other documents.

3. Explain the various parts of speech.
   The medical assistant should be familiar with the various parts of speech and the way to use them correctly in a sentence. Nouns name something, such as a person, place, or thing; pronouns are substitutes for nouns. Verbs are action words and express movement, a condition, or a state of being. Adjectives usually describe nouns, whereas adverbs modify, describe verbs. Prepositions are connecting words, as are conjunctions, conjunctions show strong feelings and are often followed by an exclamation point.

4. Name some essential references for the medical assistant’s library.
   Developing a personal tool collection that can assist the medical assistant with written communications in the medical office is very helpful. An up-to-date dictionary, a medical dictionary, a composition handbook, an English language reference manual, and a thesaurus are valuable additions to the references library.

5. Explain how to organize technical information and summaries.
   Using templates and/or a portfolio allows completion of all types of written information in an organized way. Technical information and summaries should be logical, to the point, and not cluttered with unnecessary wording and phrases. These documents must also have accurate spelling, grammar, and sentence structure. Before any type of correspondence is composed, the piece should be read carefully. When a highlighter is used to mark questions that must be answered, or notes may be written on the correspondence is parallel. A draft of the reply should be written first, and the correspondence then should be rewritten in its final draft.

6. Discuss applications of electronic technology in effective communication.
   Using electronic technology to communicate allows the medical assistant to complete tasks faster and more efficiently. Letters can be saved and used again by simply changing names and pertinent data. A portfolio of commonly used forms and letters can be stored electronically and used when needed.

7. List the four common sizes of letterhead stationery.
   Standard (or letter) stationery, which is most commonly used for business purposes, is 8½ × 11 inches. Monarch (or executive) stationery is 8½ × 10½ inches and is used for informal business correspondence. Business stationery is 5½ × 8½ inches, and legal stationery is 8½ × 14 inches.

8. Discuss the differences in the four letter styles.
   Block is an efficient but less attractive letter style in which all lines begin flush with the left margin of the paper. Modified block is similar, but some lines begin at the center of the page instead of the left margin. Modified block with indented paragraphs is identical to block style, except for the indentation of the paragraphs. Simplified letter style has lines that begin flush at the left margin, but other items, such as the salutation and complimentary closing, are omitted.

9. Describe how to compose, proofread, and mail a business letter.
   Business letters must look professional and have sentences that are grammatically correct. The process for proofreading a business letter or publication for accuracy is outlined in Procedure 13-1.
10. Explain the four standard parts of a business letter.
The four standard parts of a business letter are (1) the heading, (2) the
opening, (3) the body, and (4) the closing. The heading includes
the letterhead and dateline, and the opening includes the inside address
and any attention or salutation line. The body is the message of the
document, and the closing includes the signature, complimentary closing,
reference initials, and special notations.
11. Organize technical information and summaries.
Most written documents include the four standard parts of a basic busi-
ness letter or memo—the heading, opening, body, and closing. If a list
of questions is to be answered, address them in the same order as
presented. When responding to any review of information, present it in
the order that it was given. Follow office policies and procedures when
organizing technical information and/or summaries.
12. Discuss the process of developing and the value of keeping a com-
munications portfolio.
Subsequent letters are much easier to draft if the medical assistant
develops a portfolio that contains sample letters and other types of
communications. Once a letter has been written, it can be saved on
the computer hard drive or on a disk, or it can be printed and
placed in a binder for easy viewing. If the letter is kept in a binder,
the file name under which it is saved on the computer should be
noted on each example, so that the document can be easily found
again. This is an excellent way to save time in the busy medical
office.
13. Discuss how to open, sort, and annotate incoming mail.
Mail is one of the most common types of communication used in the
physician’s office. The process for responding to and initiating written
correspondence is outlined in Procedure 13-3.
14. Explain how to save money when mailing.
The medical assistant should consult the post office when mailing,
checking for better rates, and using ZIP codes.
15. Describe the proper way to send a fax.
Transmissions sent by fax must arrive at their destination in a confidential
manner. The process for preparing a fax for transmission should be out-
lined in every office policy and procedure manual. Simply enter the phone
number into the machine and place the document in the letter tray. If
faxing from the computer, click on the fax icon and enter the number,
then designate the document to send. Most fax machines provide a
sender’s receipt once the document has reached its destination.
16. Explain how to process incoming mail.
Most physicians’ offices have a process for dealing with mail that arrives
at the facility. The method for processing incoming mail is outlined in
Procedure 13-5.
17. Explain how to address an envelope according to the U. S. Postal
Service’s optical character reader guidelines.
Addresses should be written in such a way that they are quickly and
efficiently read by postal service machines. The process for addressing
an envelope according to the Postal Service’s optical character reader
guidelines is outlined in Procedure 13-4.

CONNECTIONS

Study Guide Connection: Go to the Chapter 13 Study Guide. Read
and complete the activities.

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