

# 7

## Written Communication

### Case Study

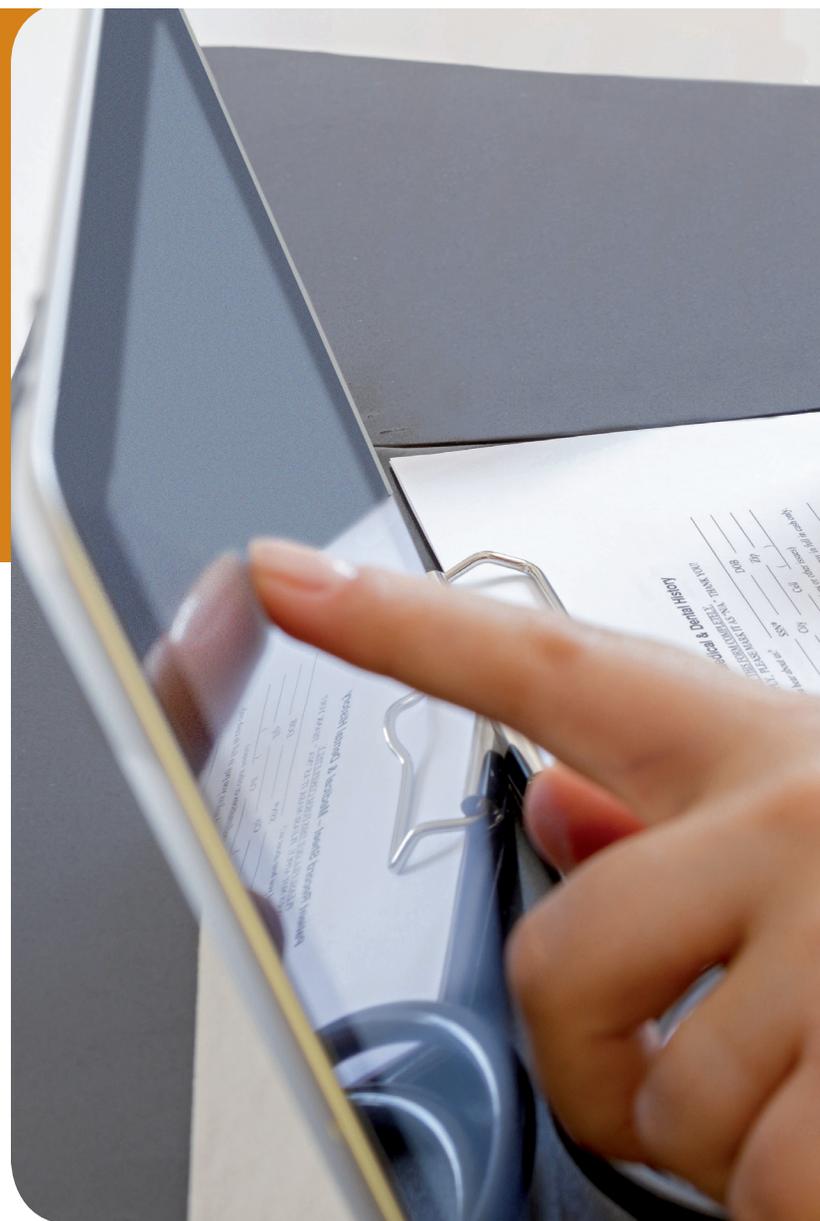
Read the following case study and answer the critical thinking questions presented throughout the chapter.

Dr. Calvin Jones brings the certified medical assistant a business card from the medical equipment salesperson he just had lunch with and asks the assistant to type a letter to the salesperson. In the letter, the physician would like to thank the salesperson for showing him a new electrocardiogram (**ECG**) machine and indicates that while he is uninterested in purchasing the machine now, the salesperson should call after the first of the year to assess the physician's willingness to purchase one at that time.

### Objectives

*After completing this chapter, you should be able to:*

- 7.1** Define and spell the key terminology in this chapter.
- 7.2** Write letters to patients and other health care professionals using correct grammar, spelling, and punctuation.
- 7.3** List and describe components of the business letter.
- 7.4** Detail the process of proofreading a business letter.
- 7.5** Discuss the use of the photocopier in the medical office.
- 7.6** List accepted health care abbreviations.
- 7.7** Describe appropriate memo use in the medical office.



- 7.8** Mail written communication and classify mail, including its size and postage requirements.
- 7.9** Develop a policy for incoming and outgoing e-mail to patients.
- 7.10** Manage incoming mail and correspondence.

### Competency Skills Performance

1. Compose a business letter.
2. Send a letter to a patient about a missed appointment.
3. Proofread written documents.
4. Prepare a document for photocopying.
5. Fold documents for window envelopes.
6. Open and sort mail.
7. Annotate written correspondence.

## Key Terminology

**annotation**—process of reading a document and highlighting pertinent information

**body**—main portion of a business letter

**closing**—ending portion of a business letter

**electronic mail**—message sent electronically from one person to another; also called e-mail

**font**—style of type

**letterhead**—professional-quality stationery with a business's contact information (e.g., name, address, telephone and fax numbers)

**logo**—image that represents a business entity or brand

**memo**—interoffice note

**postage meter**—electronic scale used for weighing packages and printing postage labels

**proofreading**—process of reading and reviewing a document for errors

**proofreader's marks**—notations used when reading and reviewing a document for errors

**reference initials**—in a professional letter, the all-capital initials of the author followed by the all-lowercase initials of the person who typed the letter (e.g., AJF/ cmm)

**salutation**—greeting

**spell check**—software that verifies word spellings

**subject line**—in a professional letter, the subject of the letter

**thesaurus**—resource for locating alternate words with similar meanings

## Abbreviations

**ECG**—electrocardiogram

**JCAHO**—Joint Commission on the Accreditation of Healthcare Organizations (now TJC)

**MLOCR**—multiline optical character reader

**OCR**—optical character recognition

**PDR**—Physician's Desk Reference

**TJC**—The Joint Commission (formerly **JCAHO** – Joint Commission on the Accreditation of Healthcare Organizations)

**UPS**—United Parcel Service

**USPS**—United States Postal Service

## Certification Exam Coverage

### AAMA (CMA) Exam Coverage:

- Fundamental writing skills
  - Sentence structure
  - Grammar
  - Punctuation
- Formats
  - Letters
  - Memos
  - Reports
  - Envelopes
  - Chart notes
- Proofreading
  - Proofreader's marks
  - Making corrections from rough draft

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- Screening and processing mail
  - U.S. Postal Service
    - 1) Classifications
    - 2) Types of mail services
  - Processing machine/meter
  - Processing incoming mail
    - 1) Labels
    - 2) Optical character recognition (OCR) guidelines

### AMT (CMAS) Exam Coverage:

- Communication
  - Employ effective written and oral communication

### AMT (RMA) Exam Coverage:

- Transcription and dictation
  - Transcribe notes from dictation system
  - Transcribe letter or notes from direct dictation

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### Certification Exam Coverage (continued)

- Patient education
  - Patient instruction—identify and apply proper written and verbal communication to instruct patients
- Oral and written communication
  - Compose correspondence employing acceptable business format
  - Employ effective written communication skills adhering to ethics and laws of confidentiality

#### NCCT (NCMA) Exam Coverage:

- General office procedures
  - Oral and written communication skills
  - Patient instruction

## Introduction

The ability to compose written documents is crucial for the administrative medical assistant. Physicians regularly ask medical assistants to type letters to patients and other health care providers. Often, physicians will provide just basic facts and ask their medical assistants to compose letters with more detail. To perform these tasks well, the medical assistant must understand medical terminology as well as proper grammar, sentence structure, and punctuation.

bilities, but medical assistants should not rely on such programs alone. Some words might pass spell checking because they are spelled correctly, but they might be used incorrectly. For example, the words “two,” “to,” and “too” all pass computerized spell checking, but each has a distinct meaning that is sometimes confused with the others. An understanding of meaning is therefore important. Also, many spelling-verification programs lack the ability to check medical terms. As a result, medical assistants should keep medical dictionaries on hand for supplementary reference. While spell-check programs can be valuable tools, the medical assistant should take the time to read all documents for errors before giving those documents to physicians for final review and signing.

## Writing to Patients and Other Health Care Professionals

Any written correspondence from the medical office reflects the physician and the office. Typographical, grammatical, and punctuation errors are not only confusing, they reflect poorly on the medical office and may endanger the patient. Therefore, letters to patients and other health care professionals should be accurate, professional, and to the point. Each paragraph should address one topic and have no more than three to six sentences (**Figure 7-1** ■).

To compose and correct documents properly, every medical office should have a comprehensive medical dictionary, a **thesaurus** for acceptable alternative words, a desk dictionary, current coding books for procedure and diagnostic coding, and a *Physician's Desk Reference (PDR)*. Many of these items are available in electronic format, which is often easier to reference than using an actual book.

### The Role of Spell-Checking

To help ensure written correspondence is error free, most computer software programs have built-in **spell check** capa-

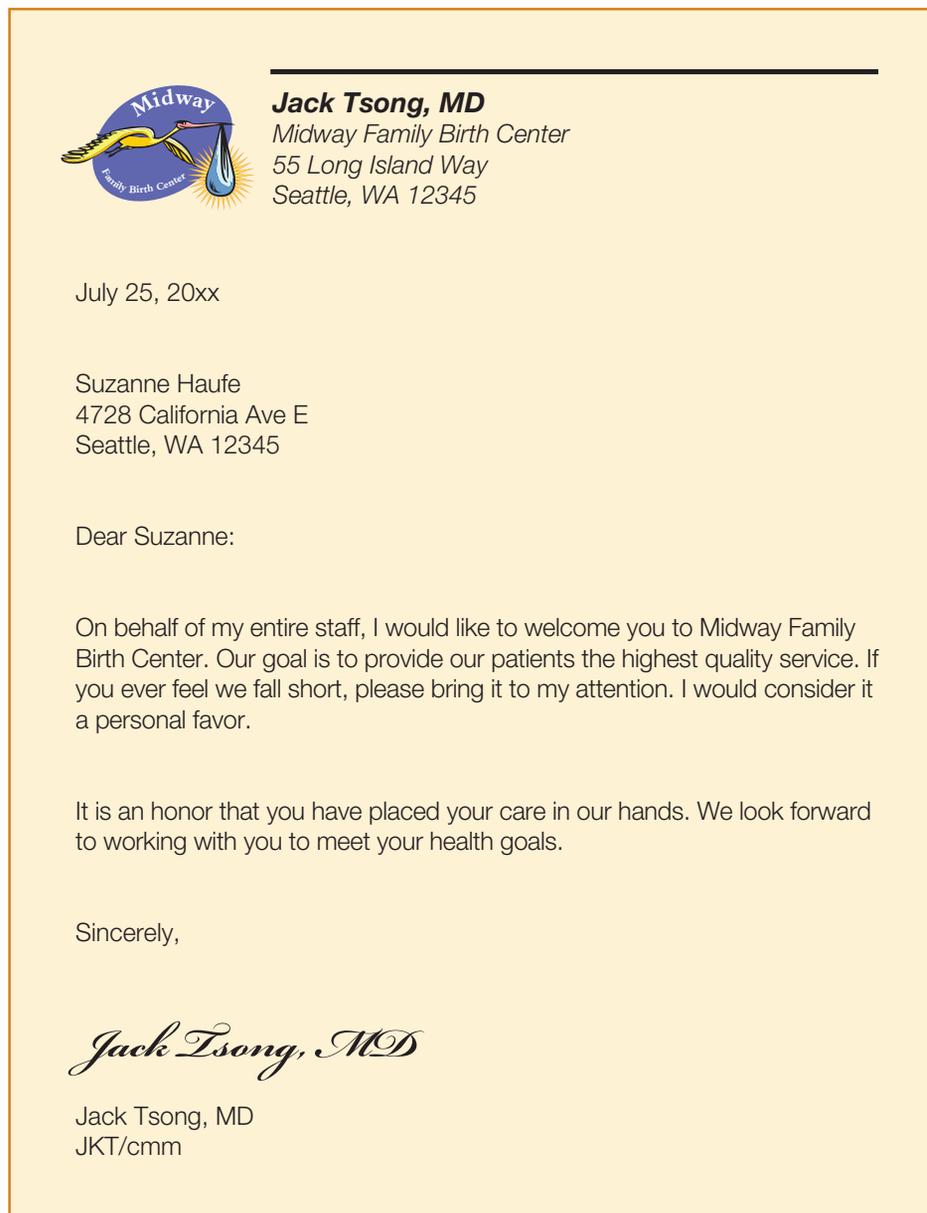
### Critical Thinking Question 7-1

Referring to the case study at the beginning of this chapter, how can the medical assistant help ensure the typed letter contains no errors?

## Proper Spelling, Grammar, and Punctuation Use

Many words in the English language, especially medical words, are commonly misspelled. Table 7-1 presents some examples. When medical assistants are unsure of correct spellings of medical terms, they should consult a comprehensive medical dictionary. Commonly used medical dictionaries include *Taber's Cyclopedic Medical Dictionary* and *Mosby's Medical Dictionary*.

Like accurate spelling, proper grammar is essential to a medical office's written correspondence. Poor grammar is unprofessional and reflects poorly on the physician and the



**Figure 7-1** ■ Sample patient letter.

acceptable	accidentally	accommodate
acquire	a lot	apparent
believe	calendar	category
cemetery	changeable	collectible
column	conscience	conscientious
conscious	discipline	embarrass
foreign	gauge	guarantee
harass	height	immediate
inoculate	judgment	leisure
liaison	maintenance	maneuver
miniature	minuscule	noticeable
occurrence	personnel	possession
privilege	publicly	questionnaire
receive	recommend	referred
relevant	schedule	threshold

office. Part of the medical assistant's role is to correct any grammar issues in physicians' drafts but retain the original intent of the content. Table 7-2 identifies common grammatical errors.

Proper punctuation is another vital focus area in written documentation. Table 7-3 outlines the rules of use for common punctuation marks.

### Critical Thinking Question 7-2

Referring to the case study at the beginning of this chapter, what are the possible ramifications for Dr. Jones if the medical assistant does not use accurate grammar, spelling, and punctuation?

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**TABLE 7-2 Common Grammatical Errors**

Error	Example
Noun/verb mismatch	"The office feels this is a bad idea." (The office cannot feel, but people can.)
Adjective used as a adverb	"I did good on that exam." (The word <i>well</i> should replace <i>good</i> .)
Sentence that ends with a preposition	"This is something we need to work on." (A proper rewrite is, "This is something on which we need to work.")
Run-on sentence	"This lab is a dangerous place, patients should not be back here." (A semicolon should replace the comma.)
Misuse of words that sound alike but differ in spellings and meanings	"Their here, just two quiet." (The sentence should read, "They're here, just too quiet.")
Fragmented sentence	Working very hard to understand the patient. (There is no subject-verb relationship. The sentence should read, "The medical assistant works very hard to understand what the patient is saying.")
Subject and predicate mismatch	Except for irregular plurals for nouns and verbs, either the subject (noun) or the predicate (verb) has to have an "s" on it. For example: The cat plays. The cats play. Singular nouns require an "s" on the verb; plural nouns require no "s" on the verb. For example: The man walks. The men walk.

### Sentence Structure

In order to compose a proper sentence, certain components must be present. Every sentence must have a subject and a predicate in order to be a proper sentence. The subject is whom or what the sentence is about. The predicate is the word that says something about the subject. As an example, consider the sentence: "The patient arrived at 2:00 P.M." The subject is the word that the verb describes. In the example sentence, the verb "arrived" is describing the subject "patient." The predicate is what the subject did. In the example sentence, the predicate is "arrived at 2:00 P.M."

### Numbers in Correspondence

In general, medical assistants should use words for quantities from one to ten in office correspondence but numbers for quantities over ten, like 24 or 876. When writing any unit of measurement, however, such as a medication dosage or weight or height,

**TABLE 7-3 Rules of Use for Common Punctuation Marks**

Mark	Use(s)
Period (.)	Indicates the end of a sentence and separates the parts of an abbreviation.
Comma (,)	Separates words, phrases, or two independent clauses and sets off elements that interrupt or add information in a sentence.
Semicolon (;)	Sets apart independent clauses and items in a list that contain commas.
Colon (:)	Follows a salutation in a business letter, precedes a list, separates independent clauses, helps express time.
Apostrophe (')	Indicates a missing letter from a contracted word and the possessive case of nouns.
Diagonal (/)	Separates the numbers in dates (e.g., 6/1/12) and fractions (e.g., 1/2) and sometimes indicates abbreviations (e.g., w/o).
Parentheses ( )	Sets off part of a sentence that is not part of the main thought.
Quotation marks (" ")	Indicates a direct quote.
Ellipsis (...)	Shows that a thought trails off or represents missing material (e.g., "I was going to, but ...").

always use numbers. For example, the medical assistant should type, "The patient is taking 5 milligrams of the medication every hour." Numbers also always apply for the time of day, such as "1:00 P.M." Numbers that begin a sentence should be spelled out.

### Rules for Medical-Term Plurals

The rules for creating plurals of medical terms can create confusion. Table 7-4 serves as a guide to the proper approaches.

**TABLE 7-4 Pluralization Rules for Medical Terms**

Singular Form	Plural	Example
a	ae	bullae to bullae
ax	aces	thorax to thoraces
ex or ix	ices	appendix to appendices
on	a	ganglion to ganglia
um	a	ilium to illia
us	i	mellitus to melliti
y	ies	idiosyncrasy to idiosyncrasies
nx	ges	phalanx to phalanges



**Figure 7-2** ■ Sample physician letterhead stationery and envelopes.

Source: Pearson Education/PH College. Photographer: Michal Heron.

## Components of the Business Letter

All business letters, including those from medical offices, have the same basic components. First, each letter should appear on **letterhead**. Most medical offices have professionally printed letterhead that carries the offices' names and addresses, telephone and fax numbers, e-mail addresses, and physicians' names (**Figure 7-2** ■). Letterhead may also contain a **logo**, some form of artwork that indicates the type of practice or other item of significance. For example, a pediatric office might have a logo that depicts children, while a chiropractic office might have a logo that includes a spine.

After letterhead, every piece of correspondence that is composed in the medical office must contain a nonabbreviated date, such as May 26, 2014, three lines down from the letterhead content at the top. Normally, a letter carries the date that the physician wrote or dictated it, not the date the medical assistant types it.

Three to six lines after the date comes the next component of the business letter: the inside address. The inside address appears against the left margin and includes the recipient's name, title, company name, and address (**Figure 7-3** ■). Table 7-5 lists the two-letter abbreviation for each state.

The **salutation** component of the business letter serves as the greeting. It typically appears two lines down from the inside address and carries the same name as the inside address. The salutations of a formal letter should include the recipient's proper names and courtesy title, such as "Dear Dr. Hagen." A more informal letter may not include a salutation. Table 7-6 provides guidelines for courtesy titles. For more informal correspondence, such as between two physicians who know each other well, a salutation may use first name only, as in "Dear Shawn." When unsure of name spellings, medical assistants should ask for verification.

### Critical Thinking Question 7-3

Referring to the case study at the beginning of the chapter, which courtesy title is appropriate for a letter to the sales representative, and why?

The **subject line** is that part of the business letter that describes the letter's purpose. The subject line should appear two lines down from the salutation and should begin with the abbreviation "RE:" which stands for "regarding." A subject line might read, "RE: Sally Luder," for example. The subject line is the patient's name when the letter is about the patient (**Figure 7-4** ■).

The **body** is the main part of the business letter. It should start two lines down from the subject line, and each of its paragraphs should address only one issue (see Figure 7-4).

The **closing** part of the letter typically appears two lines down from the ending portion of the body. The most common closing in a business letter is "Sincerely," but closing choice is at the physician's discretion. Four or five lines should be left between the closing and the physician's typed name to accommodate the physician's handwritten signature (see Figure 7-4).

**Reference initials** typically appear four to five lines down from the closing. Reference initials include the all-capital

Shawn D. Hagen, DC  
19713 Scriber Lake Road  
Lynnwood, WA 98036

**Figure 7-3** ■ Sample inside address.

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TABLE 7-5 Two-Letter State Abbreviations

State	Abbreviation	State	Abbreviation
Alabama	AK	North Carolina	NC
Alaska	AL	North Dakota	ND
Arkansas	AR	Nebraska	NE
Arizona	AZ	New Hampshire	NH
California	CA	New Jersey	NJ
Colorado	CO	New Mexico	NM
Connecticut	CT	Nevada	NV
Delaware	DE	New York	NY
Florida	FL	Ohio	OH
Georgia	GA	Oklahoma	OK
Hawaii	HI	Oregon	OR
Iowa	IA	Pennsylvania	PA
Idaho	ID	Rhode Island	RI
Illinois	IL	South Carolina	SC
Indiana	IN	South Dakota	SD
Kansas	KS	Tennessee	TN
Kentucky	KY	Texas	TX
Louisiana	LA	Utah	UT
Massachusetts	MA	Virginia	VA
Maryland	MD	Vermont	VT
Maine	ME	Washington	WA
Michigan	MI	Wisconsin	WI
Minnesota	MN	West Virginia	WV
Missouri	MO	Wyoming	WY
Mississippi	MS		
Montana	MT		

TABLE 7-6 Guidelines for Courtesy Titles

- “Mr.” is the appropriate title for males.
- Professional titles such as “MD” or “DO” replace the courtesy title. For example, “John Aye, MD,” should replace “Dr. John Aye.”
- “Ms.” is used when a woman’s marital status is unknown, the woman is divorced, or when the woman prefers.
- “Mrs.” is used for a married woman.
- “Miss” is used for a young girl or an unmarried woman who prefers it. When in doubt, use “Ms.” rather than “Miss.”
- Two people at the same address should appear separately (e.g., “Mr. Joseph Paterniti and Ms. Beth Dorio”).

initials of the physician who dictated or wrote the letter, followed by the all-lowercase initials of the medical assistant who typed the letter (**Figure 7-5** ■).

An enclosure notification should be included two lines below the reference initials to notify the recipient of any other information that might be enclosed with the letter. The notification can be rendered as “Enclosures” or “ENC.,” followed by the number (in parentheses) of items that are enclosed. For example, a letter with two enclosures would have an enclosure notification that reads “Enclosures (2)” or “ENC. (2).” When there are no enclosures, this notation is omitted.

When a copy of the letter is to be sent to another party, the notation “c:” followed by the other party’s name should

appear two lines down from the enclosure indication. For example, when Sally Luder is to receive a copy of the letter, the copy notation would read, “c: Sally Luder.”

Margins and line-spacing are often left to the preference of the letter writer, the provider, or the office manager. The goal is to make the letter look as professional as possible. If there is little text, the margins may be larger and the line spacing may be two lines so that the text appears centered on the paper.

Sometimes, business letters exceed one page. When they do, all subsequent pages must begin with the date of the letter, followed by the subject line. Pages after the first page require no letterhead, but they should appear on paper that matches the color and quality of the letterhead. Subsequent pages should be numbered.

## Margins in the Professional Business Letter

When using a word processing software, the margins will typically default to being 1” at the top and 1” at the bottom, and 1 1/2” on both the right and left sides of the documents. Though this is the default for margins, this spacing can and should be altered in certain situations. For letters that are short, such as only one or two paragraphs, margins may be increased in order to center the text. Centering the text creates a more appealing visual for the document.

**Letterhead Address** → **Mark V. Fenton, MD**  
6590 Second Avenue #901  
New York, NY 10701  
(212) 555-0987

**Inside Address** → Joseph Sangra, MD  
25 E 17th Street, #4E  
New York, NY 10701

**Subject Line** → RE: William Albano

**Greeting** → Dear Dr. Sangra:

**Body** → Thank you for the referral of William Albano. I enjoyed meeting this pleasant young man. I am in agreement with your assessment of his condition and believe that best course of action is to refer him to physical therapy for a series of not less than six sessions.

**Complimentary Close** → Sincerely,

Mark V. Fenton, MD

MVF/cmm

Figure 7-4 ■ Sample business letter.

MVF/cmm

Figure 7-5 ■ Sample reference initials.

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## ▶▶ Pulse Points

**Signing Letters for the Physician**

Occasionally, the physician will be out of the office when letters must be mailed, so she may ask her medical assistant to send those letters without the physician's signature. The review process, however, should remain the same. The physician should still read or otherwise review the letters and give her approval before the letters are sent. Approved letters can be stamped with notes such as, "Read but not signed due to time constraints." When offices lack preprinted stamps like this, the medical assistant can print the physician's name where the signature belongs and follow the printing with a personal signature to indicate that the assistant signed for the physician.

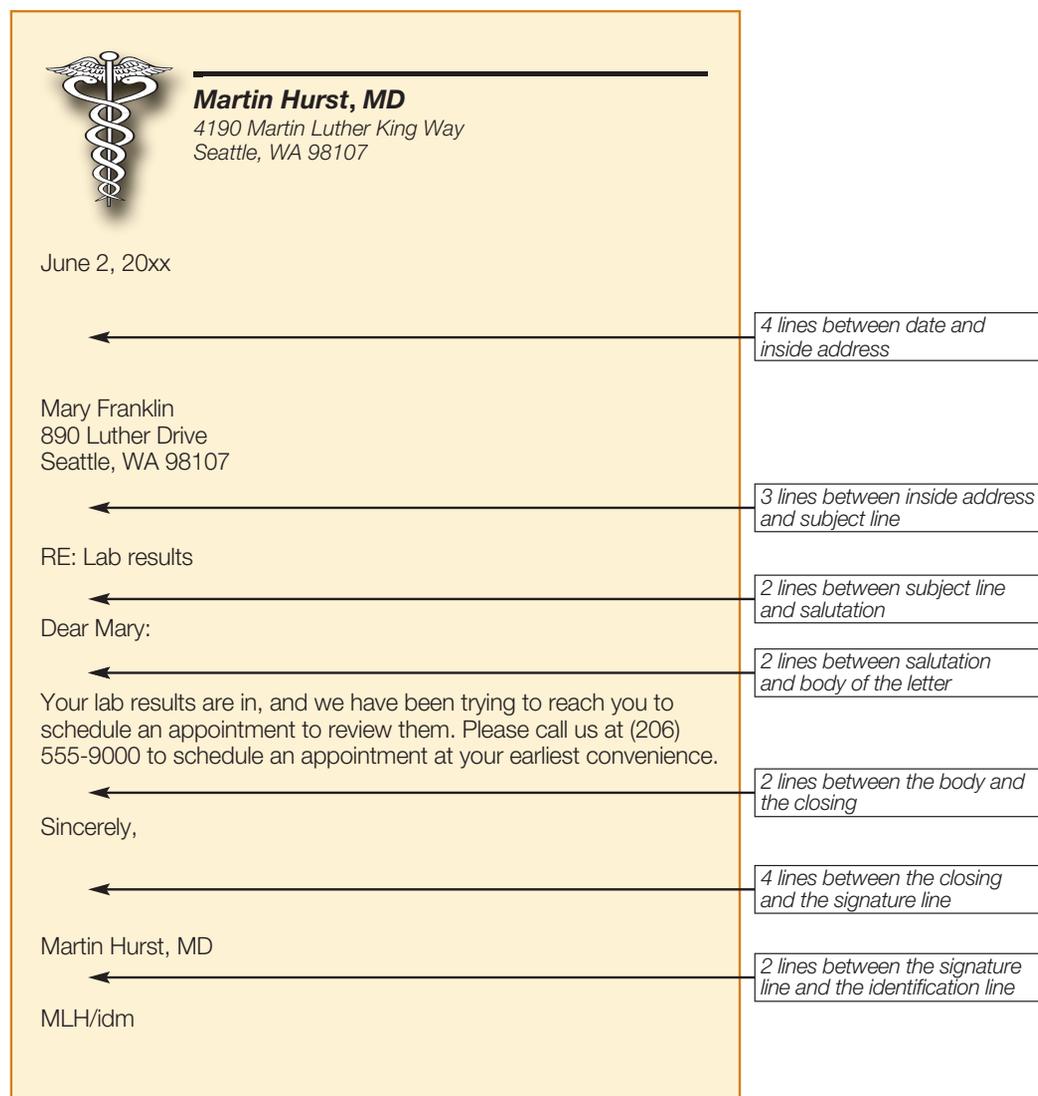
## ● In Practice

Dr. Mohammad asks Joanne Brennan, his new administrative medical assistant, to type a letter to a patient while he dictates. During dictation, Dr. Mohammad uses words unfamiliar to Joanne, so she guesses at how to spell some of the words, thinking that the patient probably won't notice.

What might happen if Joanne continues to guess at word spellings? Why is this issue important?

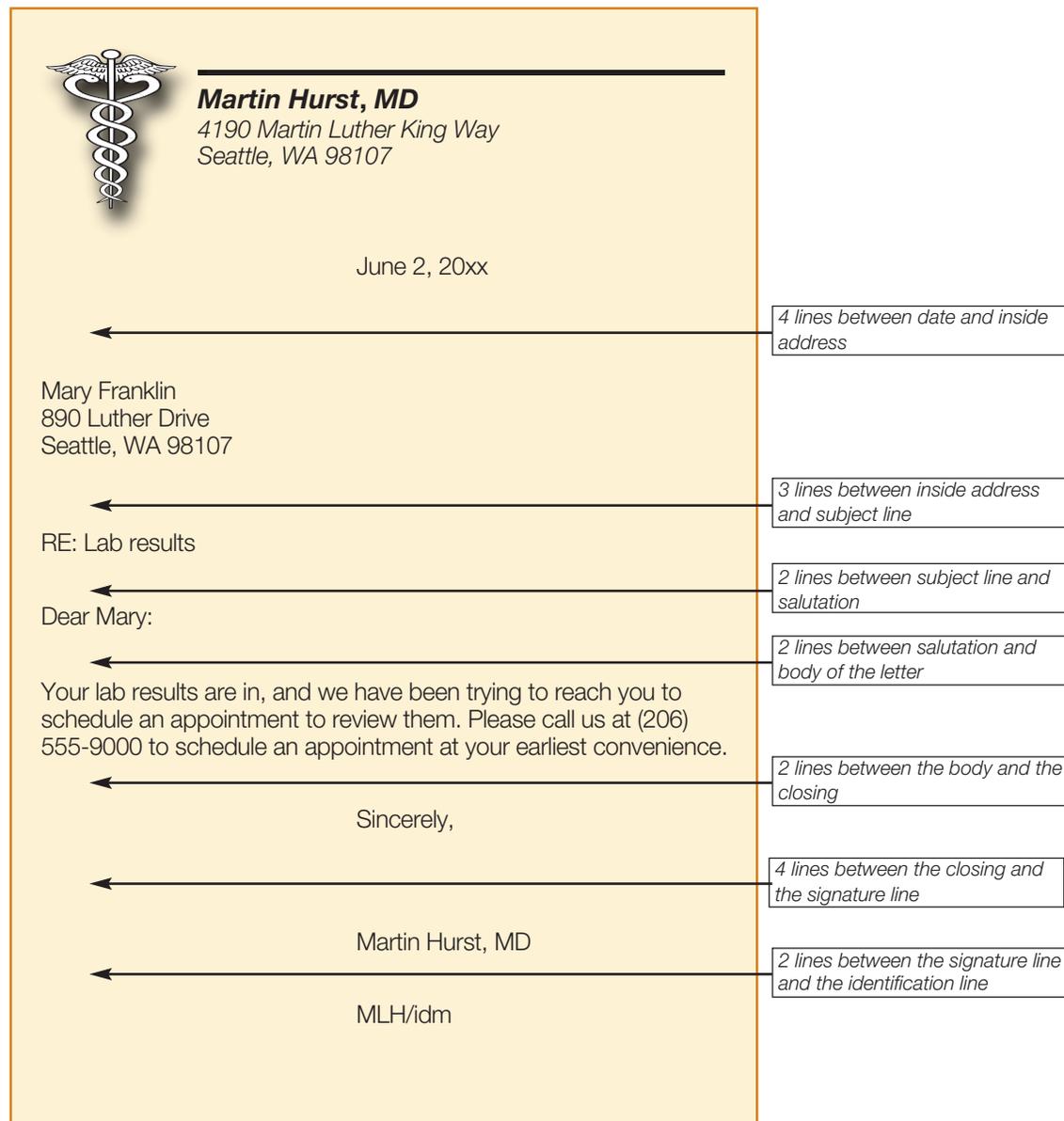
**Styles of Business Letters**

Medical offices use varied letter styles, including block (**Figure 7-6A**) ■, modified block (**Figure 7-6B**) ■, and modified block with indentations (**Figure 7-6C**) ■. Block and modified block are the most common styles, but the physician's preference dictates letter style.



A

**Figure 7-6** ■ Styles of business letters. A. Block style.



B

**Figure 7-6** ■ B. Modified block style: date, closing, signature, and identification lines center, all other lines are flush left.

## Using Fonts in Typed Communication

All word-processing software comes with a set of **fonts**, which are different styles of type. Professional letters should appear in 10- to 12-point formal fonts, like Times New Roman, Garamond, or Arial (**Figure 7-7** ■). While informal fonts may function for things like interoffice informational sheets, they are considered inappropriate for professional business letters.

## Sending Letters to Patients

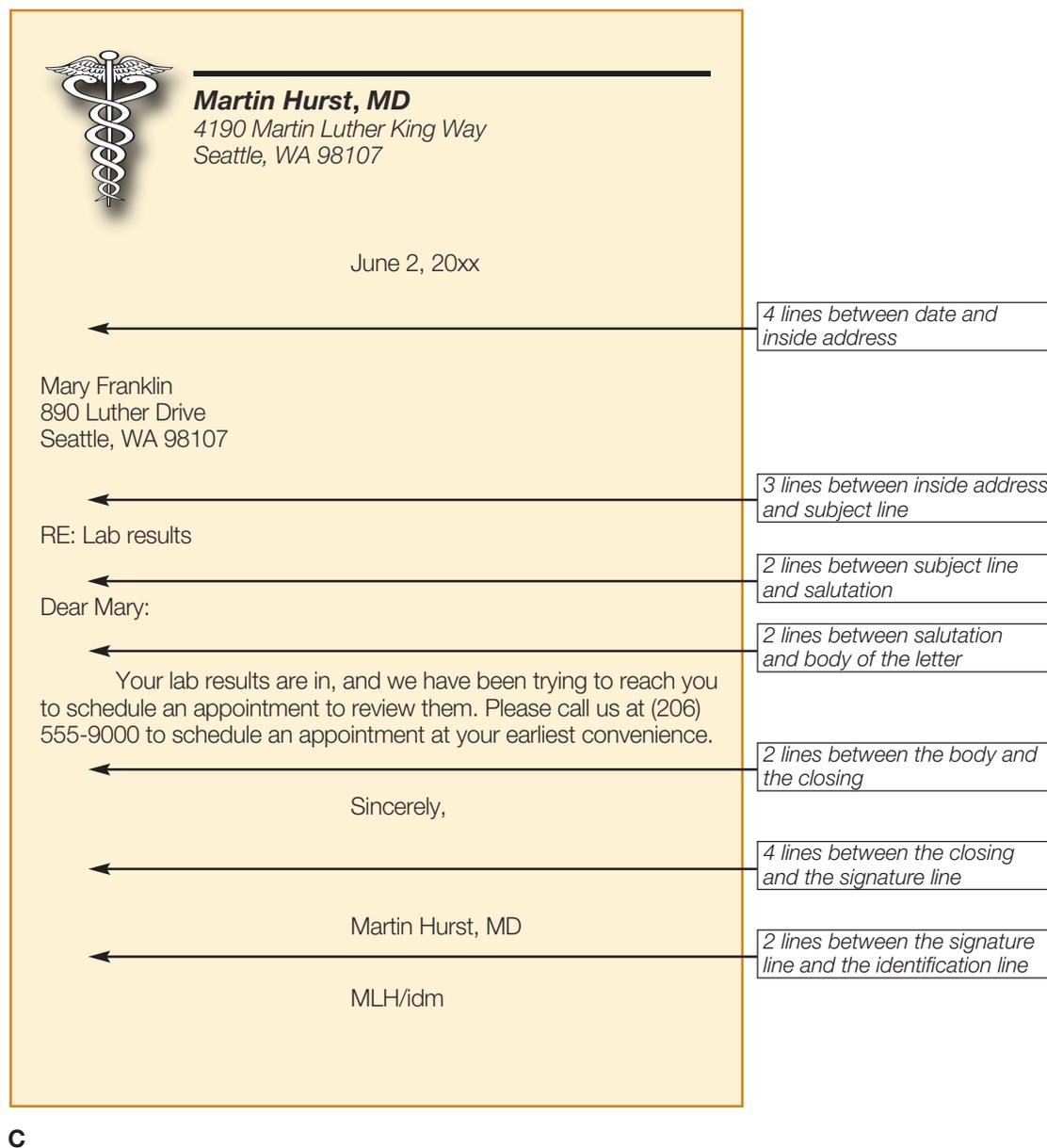
Medical offices send letters to patients for a number of reasons, including to communicate changes in office policy or procedure. Personalized letters serve to notify patients they need or have missed appointments. Whatever the reasons they

are sent, patient letters should be professional and accurate. Copies of all written patient correspondence should be included in the patients' medical records.

## Proofreading

As discussed earlier, while most word-processing software can check spelling and grammar, such programs are neither fail-safe nor complete substitutes for manual error-checking processes. Software that checks spelling may not contain medical terminology; therefore, the medical assistant will need to check other sources if unsure how to spell a particular medical term. Because most documents today are composed electronically, medical assistants can proofread and correct those documents before printing. **Proofreading** is the process of

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**Figure 7-6** ■ C. Modified block with indentations: resembles modified block style, except that each paragraph is indented five spaces.

Arial 10-point font	Arial 12-point font
Garamond 10-point font	Garamond 12-point font
Times New Roman 10-point font	Times New Roman 12-point font

**Figure 7-7** ■ Sample fonts.

checking written information for spelling or other errors. Sometimes, proofreading includes modifying a letter's style (e.g., line format) to make the letter more appealing on paper.

Proofreading requires medical assistants to read documents slowly and check that the documents are clear and logically organized. To indicate needed changes, medical assistants place **proofreader's marks** on printed documents (**Figure 7-8** ■).

To catch all errors, medical assistants should read all letters at least twice. A final version of the document should be printed only after it has been proofread. Once documents are printed, medical assistants should proofread them one last time to determine if format changes, like more or less space between lines, would make the documents more attractive.

## Photocopying in the Medical Office

Though many medical offices today operate with an electronic health record, documents must still often be photocopied for the patient or for the patient's chart. Examples of items that must be photocopied for the patients' medical records would be



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## PROCEDURE 7-1 Compose a Business Letter

### Theory and Rationale

Administrative medical assistants often compose business letters from physicians. Because these letters directly reflect the physicians, they must be professional, grammatically correct, and free of typographical errors.

### Materials

- Computer with word-processing software
- Information for the letter

### Competency

1. Determine the recipient and content of the letter.
2. Using the word-processing software, type the date of the letter.
3. Type the recipient of the letter.
4. Type the subject line.
5. Type the greeting of the letter.
6. Type the body of the letter.
7. Type the salutation.
8. Indicate enclosures, if any.
9. Indicate if a copy of the letter will be sent to another party.
10. Enter the initials of the letter's author, followed by your initials as the typist.
11. Perform complete electronic spelling and grammar checks.
12. Print the letter.
13. On paper, perform manual spelling and grammar checks.
14. Give the letter to the physician for her signature.
15. Address an envelope.
16. Send the letter.

to use and those it should avoid. Table 7-7 on page 136 lists the latter. TJC prepared this list due to the growing concern that the use of more than one abbreviation for the same medical term created a situation where confusion, misdiagnosis, or even injury to the patient could occur. In the medical office, lists like these help staff maintain consistent terminology and avoid confusion and errors. Medical offices might have differing versions

of the accepted medical abbreviations that are used in that facility. For example, one office might use the abbreviation "BS" to indicate a patient's breath sounds, whereas another medical office may use the same abbreviation to indicate a patient's bowel sounds. Medical assistants who are unsure about abbreviations should always err on the side of caution and spell out the corresponding words.



## PROCEDURE 7-2 Send a Letter to a Patient about a Missed Appointment

### Theory and Rationale

Administrative medical assistants regularly write professional letters to patients. These letters may be sent for a variety of reasons when the physician wishes to communicate in writing with the patient, such as when the patient misses an appointment. Often, written communication is used when the physician desires written proof of what was said to the patient. Strict attention to detail helps avoid miscommunication between the patient and the medical office.

### Materials

- Computer with word-processing software
- Patient medical record

### Competency

1. Using the word-processing software, type the date at the top of the letter.
2. Type the patient's name and mailing address.
3. Type the salutation.
4. For the subject line, type "RE: Missed Appointment."
5. In the body of the letter, describe the appointment that was missed, including its date.
6. Per the physician's instructions or office policy, list the reasons the patient should call to reschedule the missed appointment.
7. Type the closing and the physician's name.
8. Obtain the signature of the letter's author (yours or the physician's).
9. Copy the letter for the patient's file.
10. Send the patient the original letter.



## PROCEDURE 7-3 Proofread Written Documents

### Theory and Rationale

Proofreading skills are imperative to the administrative medical assistant, because the composition of written documents is a large part of administrative medical assisting. Documents sent out without proofreading can confuse the recipient, or even lead to possible misdiagnosis or treatment of a patient.

### Materials

- Computer document to be proofread
- Computer with word-processing software

### Competency

1. Open the document using the word-processing software.

2. Use the word processor's spelling and grammar checking functions.
3. Save any changes.
4. Starting at the top, read the entire document to verify that all spelling, punctuation, and grammatical errors were corrected.
5. Save any changes.
6. Print the document.
7. Review the entire document to verify that all spelling, punctuation, and grammatical errors were corrected. If changes were made, reprint the document.
8. Give the document to the physician for signature.

## Creating Memos for the Office

A **memo** is a type of intraoffice correspondence. Memos are a quick and efficient means of communication. They require no postage and are designed to have clear messages. Office managers might compose memos to communicate with their entire staff, or staff members may write memos to communicate with other staff.

Most memos begin with the word "MEMO" or "MEMORANDUM" at the top. Below that, typically the date, recipient, and author appear (**Figure 7-9** ■). Many medical offices pre-print memo paper, but some print memo paper on an as-needed basis.

Aside from the use of memos for interoffice communications, many offices have an electronic means for this purpose. The office staff may send e-mails to one another, or the electronic health record may have a mechanism for sending messages from one staff member to another.

## Mailing Written Communication

Standard paper size is  $8\frac{1}{2}'' \times 11''$ , while standard business envelope size is  $4\frac{1}{8}'' \times 9\frac{1}{2}''$ . Professional business letters should be mailed in business-sized or "Size 10" envelopes. Such envelopes easily accommodate business letters that are folded in thirds (**Figure 7-10** ■).



## PROCEDURE 7-4 Prepare a Document for Photocopying

### Theory and Rationale

Many documents in the medical office will need to be photocopied. Often, originals are sent to the patient and copies are kept in the patient's file. The medical assistant must be familiar with how the photocopier works and the steps to correctly copy needed documents. Depending on the type and functions of the photocopier, the steps in this procedure may be modified.

### Materials

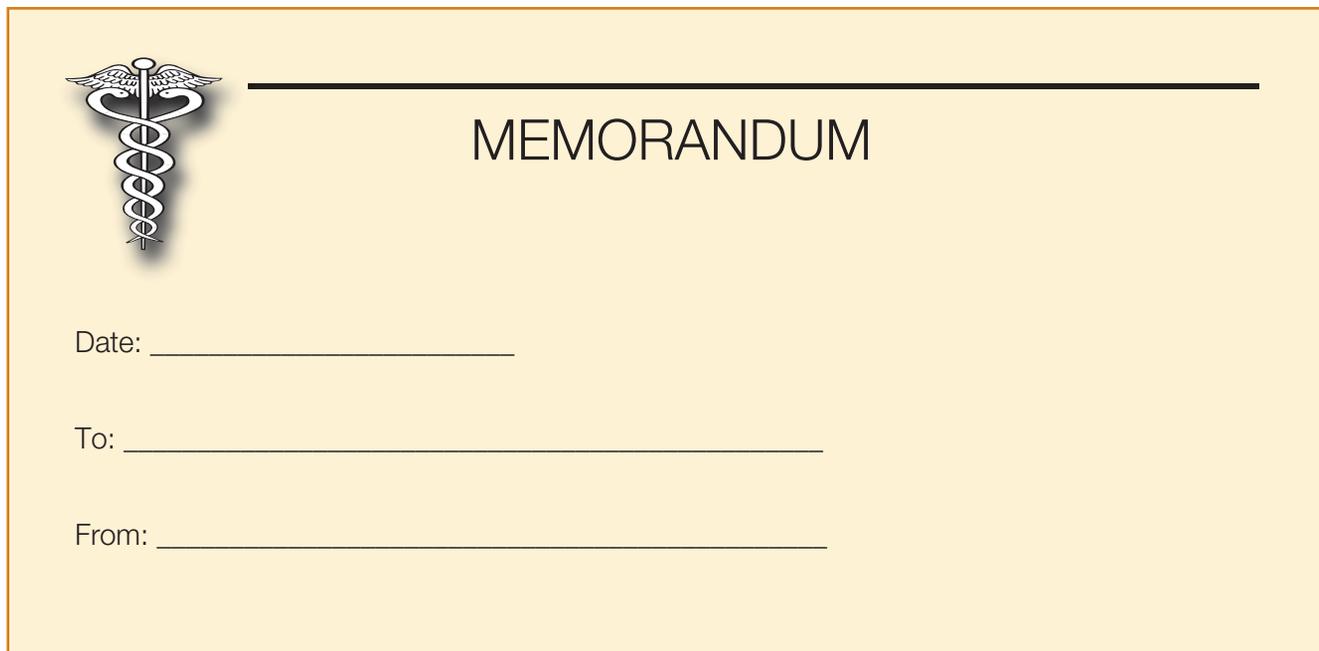
- Photocopier
- Document to be copied
- Envelope
- Patient medical record

### Competency

1. Turn the photocopy machine on and allow time for it to warm up.

2. Place the document to be copied face down on the glass surface of the photocopier, following the diagram on the photocopier.
3. Indicate the number of copies needed by entering the number in the appropriate place on the photocopier.
4. Press the "copy" button on the photocopier.
5. Once the copy has been made, remove the original.
6. Place the original document into an envelope to be mailed to the patient.
7. Place the photocopy of the document into the patient's file.

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**MEMORANDUM**

Date: \_\_\_\_\_

To: \_\_\_\_\_

From: \_\_\_\_\_

**Figure 7-9** ■ Sample opening of an intraoffice memo.

TABLE 7-7 Medical Abbreviations to Avoid		
Abbreviation	Potential Problem	Preferred Replacement(s)
U (unit)	Mistaken for “0” (zero), the number “4” (four), or “cc”	“unit”
IU (International Unit)	Mistaken for IV (intravenous) or the number 10 (ten)	“International Unit”
Q.D., QD, q.d., qd (daily); Q.O.D., QOD, q.o.d., qod (every other day)	Mistaken for each other. The period after the Q is mistaken for “l” and the “O” is mistaken for “l” (q.i.d. is four times a day dosing)	“daily” or “every other day”
Trailing zero (X.0 mg) Lack of leading zero (.X)	Decimal point is missed	X mg or 0.X mg
MS	Can mean morphine sulfate or magnesium sulfate	“morphine sulfate”
MS04 and MgS04	Confused for one another	“magnesium sulfate”

Source: *The Joint Commission*.



**Figure 7-10** ■ When folded into thirds, the letter will easily fit within the standard business envelope.

Source: *Pearson Education/PH College*. Photographer: *Michal Heron*.

The envelope’s upper left corner should carry the office’s address (**Figure 7-11** ■). Many offices buy envelopes pre-printed with this information. The recipient’s name and address should appear in the envelope’s center and the stamp or postage-meter mark in the far upper right. When mail is personal, the word “Personal” or “Confidential” should appear below the recipient’s address.

Some medical offices place their required registration forms on their Web site. By directing patients to access the



**Figure 7-11** ■ Example of a properly addressed business envelope.

Source: Pearson Education/PH College. Photographer: Dylan Malone.

Web site to download, print, and fill out the needed forms, the medical office saves the cost of printing the packets and mailing them to the patient ahead of time.

## Window Envelopes

For certain types of mail, like insurance billing forms or patient billing statements, medical offices often use window envelopes. Before such envelopes are sealed, however, medical assistants should ensure that addresses appear in the window (Figure 7-12 ■).

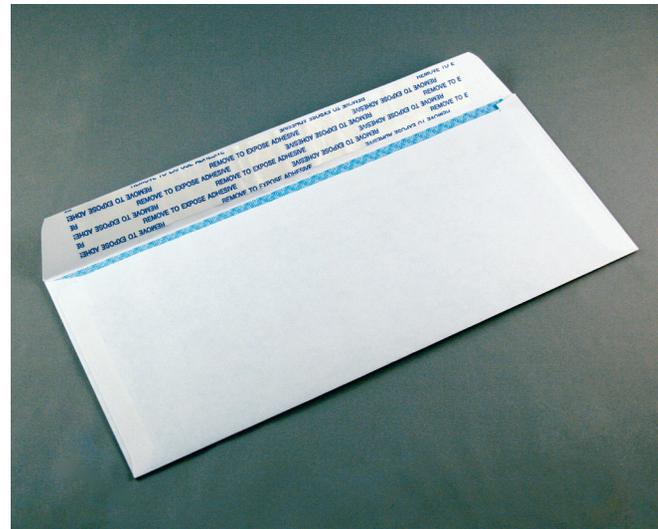
## HIPAA Compliance

Regardless of size or type, for personal patient information medical offices must use security envelopes. Security envelopes have internal patterns that keep the contents of documents obscured. Figure 7-13 ■ shows a security envelope.



**Figure 7-12** ■ Example of a window envelope.

Source: Pearson Education/PH College. Photographer: Dylan Malone.

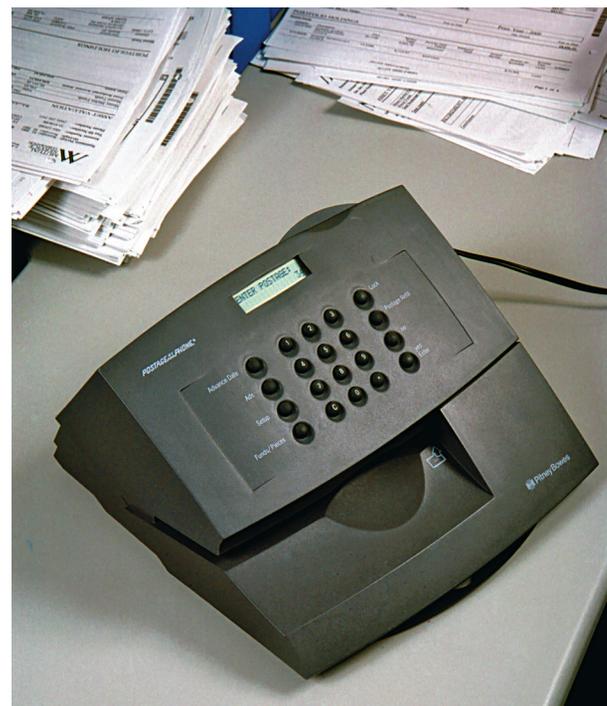


**Figure 7-13** ■ Example of a security envelope.

Source: Pearson Education/PH College. Photographer: Dylan Malone.

## Postage Meters in the Medical Office

Many medical clinics have **postage meters**, which weigh mail pieces, determine correct postage and print postage on envelopes or labels (Figure 7-14 ■). Basic models simply weigh pieces of mail and print postage, while advanced versions accept stacks of mail, insert documents into envelopes, seal envelopes, and affix proper postage. Postage meters are extremely useful to the medical office because



**Figure 7-14** ■ An electronic postage meter.

Source: PhotoEdit, Inc./ Photographer: Spencer Grant.



## PROCEDURE 7-5 Fold Documents for Window Envelopes

### Theory and Rationale

When documents are folded properly before they are placed in window envelopes, post-office machinery can read addresses correctly and deliver mail in a timely manner.

### Materials

- Document to be mailed
- Window envelope

### Competency

1. Locate the mailing address on the document.
2. Compare the location of the mailing address to the location of the window on the envelope.
3. Fold the document such that the mailing address will be viewable through the envelope's window once the document has been inserted in the envelope.
4. Insert the document in the envelope.
5. Verify that the address is viewable through the window.
6. Seal the envelope.

they are generally user friendly and reduce wasted postage as well as time spent at the post office.

Most medical offices lease their postage meters from companies that supply the meters as well as corresponding supplies (e.g., ink cartridges, ribbons, labels). Once an office has arranged payment for its postage, the medical assistant facilitates meter use by calling the postage company's customer service department and providing the office's user identification number, office password, and meter serial number and access code.

## Classifying Mail, Size Requirements, and Postage

The United States Postal Service (USPS) offers various services for mailing letters and packages according to urgency and value (Figure 7-15 ■). A standard postage stamp facilitates first-class mail service, which is available for items weighing no more than 13 ounces. Mail that weighs over 13 ounces must be sent via Priority Mail or Parcel Post.



**Figure 7-15** ■ USPS packaging.

Source: Pearson Education/PH College. Photographer: Dylan Malone.

## ▶▶ Pulse Points

### Choosing the Type of Mail Service to Use

Use This Service	When ...
First Class Mail	Letters need not be received before 3 to 5 days and weigh no more than 13 ounces.
Priority Mail	Letters weigh more than 13 ounces, or packages have a maximum combined length, width, and depth of 108 inches, and must arrive within 2 to 3 days.
Priority Mail Flat Rate	Heavy items must arrive within 2 to 3 days and can fit into USPS Flat Rate envelopes or boxes.
Express Mail	Items must arrive by the next day.
Media or Standard Mail	Printed or bound materials (e.g., books or magazines, CDs or DVDs) must be sent.

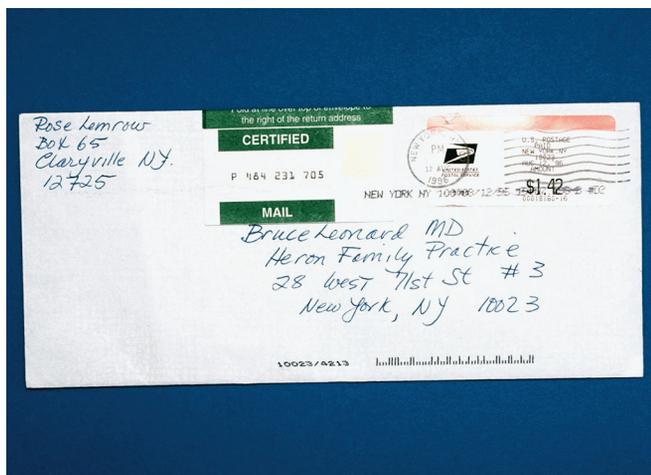
After Express Mail, which is the fastest USPS service (with guaranteed next-day delivery 7 days a week), Priority Mail is the U.S. government's fastest mail service. For most destinations in the U.S., Priority Mail arrives within 2 to 3 days. However, Priority Mail items must weigh no more than 70 pounds, and packages cannot exceed a combined length, width, and depth of 108 inches. The USPS charges one flat rate to use their flat rate envelopes and boxes, regardless of where the item is being shipped within the United States or how much it weighs. When senders use envelopes and packages provided by USPS that clearly state "Flat Rate," Priority Mail is available at a flat rate.

Media Mail, or Standard Mail, is strictly for printed or bound materials such as books or magazines, sound recordings, videotapes, or CDs and DVDs. This service is more economical than the other services, but it tends to take longer, usually 2 to 10 days. Advertising cannot be sent by Media Mail.

In addition to its base services, the USPS offers a variety of optional services for an additional cost. Using certified mail, for example, provides a mailing receipt and a record of the mailing at the local post office, but it is available only for First-Class and Priority Mail packages and letters. Confirmation receipts are another, added service (Figure 7-16 ■). Delivery confirmation allows senders and receivers to track pieces of mail or packages online. Registered mail, another option available for only First-Class and Priority Mail, offers the ability to purchase insurance for the value of the item, up to \$25,000. A return receipt can also be added to this service. Insurance can be purchased for any item shipped via the USPS, but the cost of the insurance rises with the value of the item.

## Buying Postage Online

The USPS now sells postage online to any consumer with a computer and a printer. This service is available for both domestic and international shipments and includes such options as insurance (up to a \$500 value) and delivery confirmation.



**Figure 7-16** ■ Important items should be sent via certified mail. Source: Pearson Education/PH College. Photographer: Michal Heron.

## Using Multiline Optical Character Readers

The USPS uses multiline optical character readers (MLOCRs), with optical character recognition (OCR) to determine how to route mail through its systems. MLOCRs captures the image of the front of a piece of mail, looks up postal codes, prints barcodes, and performs mail sorts.

MLOCRs cannot read all mail, however. Some handwriting is hard to read and addresses might sometimes appear in incorrect locations. This type of mail is either sent to another, more powerful computer for scanning or to a human operator.

## “ZIP + 4” Codes

The ZIP code is the USPS system of using five digits to indicate mail's intended destination. Since 1983, the USPS has been using “ZIP + 4” codes to expedite postal service by directing mail to more precise locations. These codes, which, as their name suggests, extend traditional ZIP codes by four digits, appear on the USPS Web site at <http://zip4.usps.com/zip4/welcome.jsp>.

## USPS-Approved Abbreviations in Addresses

Mail that follows USPS recommendations reaches its destination far more quickly than mail that does not. Some of these recommendations—approved abbreviations for mailing addresses—appear in Table 7-8.

## Restricted Materials

The USPS will mail no item that is outwardly or of its own force dangerous or injurious to life, health, or property. Similarly, it will not transport most hazardous material. The following items are also subject to certain restrictions:

- Intoxicating liquors
- Firearms
- Knives or other sharp instruments
- Odor-producing chemicals
- Liquids and powders
- Controlled substances

When in doubt about whether an item can be mailed, the medical assistant should call or visit the USPS.

## Other Delivery Options

Some services compete with the USPS by offering package tracking, insurance, and delivery services; these services include Federal Express, United Parcel Service (UPS), and

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TABLE 7-8 USPS-Approved Abbreviations

For Streets and Towns			
Alley	ALY	Hill	HL
Annex	ANX	Island	IS
Avenue	AVE	Junction	JCT
Boulevard	BLVD	Lake	LK
Bridge	BRG	Lane	LN
Brook	BRK	Manor	MNR
Bypass	BYP	Meadow	MDW
Canyon	CYN	Mountain	MTN
Cape	CPE	Orchard	ORCH
Causeway	CSWY	Parkway	PKWY
Center	CTR	Place	PL
Circle	CIR	Plaza	PLZ
Cliff	CLF	Point	PT
Club	CLB	Port	PRT
Common	CMN	Ridge	RDG
Corner	COR	River	RIV
Court	CRT	Road	RD
Cove	CV	Route	RTE
Creek	CRK	Shore	SHR
Crossing	XING	Spring	SPG
Drive	DR	Square	SQ
Estate	EST	Station	STA
Expressway	EXPY	Street	ST
Forest	FRST	Terrace	TER
Freeway	FWY	Throughway	TRWY
Garden	GDN	Trail	TRL
Gateway	GTWY	Tunnel	TUNL
Grove	GRV	Turnpike	TPKE
Harbor	HBR	Valley	VLY
Heights	HTS	View	VW
Highway	HWY	Village	VLG
For Secondary Unit Designators			
Apartment	APT	Office	OFC
Basement	BSMT	Penthouse	PH
Building	BLDG	Room	RM
Department	DEPT	Space	SPC
Floor	FL	Suite	STE
Front	FRNT	Trailer	TRLR
Lobby	LBBY	Upper	UPPR
Lower	LOWR		

DHL. Federal Express (FedEx) offers overnight courier, ground delivery, heavy freight delivery, and document copying services. FedEx services are available both to home and business customers, and FedEx offers shipping via its Express, Ground, Freight, and International services. The United Parcel Service (UPS), much like FedEx, offers shipping services both within the United States and worldwide via various shipping speeds and methods. Both of these companies offer package pickup, which alleviates the need to take a package to a FedEx or UPS retail location. The Deutsche Post World Net (DHL) offers shipping services worldwide at a variety of shipping speeds. In 2003,

DHL purchased Airborne Express—then the third largest private express delivery company in the United States.

## Using E-Mail to Communicate

**Electronic mail**, or e-mail, is an electronic means of communication. Many medical offices use e-mail to communicate with patients. As a general rule, patients who give medical offices their e-mail addresses authorize those offices to send them e-mail. However, it is crucial that medical staff remember that e-mail is far from secure. For example, e-mail addresses can be misspelled, causing incorrect parties to receive messages. Also, employers have the right to view any e-mail their employees send on company systems. Because confidentiality is not guaranteed, all medical staff, including the medical assistant, should only use e-mail to send patients such nonconfidential information as appointment reminders. Many medical offices today have instituted an encrypted e-mail system so that it can be used for communication with patients.

Medical office managers will likely have a policy in place for when an e-mail is appropriate to send to a patient. Sending sensitive patient information, for example, will likely be forbidden in the policy. Even sending patient appointment reminders may be against the office policy for an e-mail.

Many medical offices provide patients with the e-mail addresses of providers, or even staff. These e-mail addresses may be listed on the clinic's website. In the event a patient sends an e-mail to the office, the medical assistant must respond in a manner that maintains the patient's privacy. For example, if the patient were to send an e-mail asking for the results of her laboratory work or other sensitive information, the assistant should respond with a telephone number the patient may call to receive those results directly.

E-mails from patients should be responded to in a timely manner. Typically, that means within one business day of receipt. E-mail etiquette dictates that one refrain from typing in all caps, as that is seen as "shouting" in written form. Because written communication, including e-mail messages, can be misunderstood due to the lack of being face-to-face in the conversation, medical assistant should be clear in the communication so that no misunderstanding occurs.

## ▶▶ Pulse Points

### Text Messaging with Patients

Many businesses today, including medical offices, provide customers with the ability to receive text message reminders for appointments. These messages should not be any more explicit than e-mail messages but can be used for appointment reminders.

## Social Media in Communications

Social media, such as Facebook or Twitter, are common means of communication today. Many medical offices maintain social media sites as a form of marketing and advertising

to the community. Occasionally, patients may post messages to the clinic's social media site that contain personal information. Members of the medical office staff should not engage in conversations that violate the patient's HIPAA-mandated privacy, even when the patient is the one who first posts on the topic. In the event a patient posts something of this nature to a social media site, the proper way to respond, if a response is called for, is to contact the patient directly via telephone.

## Managing Mail and Correspondence

Administrative medical assistants are typically in charge of sorting and distributing the medical office's incoming mail (Figure 7-17 ■). Because many such items, such as pathology reports or consultation letters, are time sensitive, assistants should sort and distribute incoming mail daily.

Often, the person who sorts and distributes the mail is also asked to stamp the date the mail was received. Many offices also require the person sorting the mail to open each piece so recipients can easily access the contents. Items marked "personal" or "confidential" should be left unopened, however.

To avoid confusion, each office should have a mail sorting and distribution policy that includes a list of the items each staff member should receive. For example, the physician may receive all communications or reports regarding patients, any professional journals, and literature from professional



**Figure 7-17** ■ The medical assistant is commonly the person to open and sort the mail.

Source: Pearson Education/PH College. Photographer: Michal Heron.

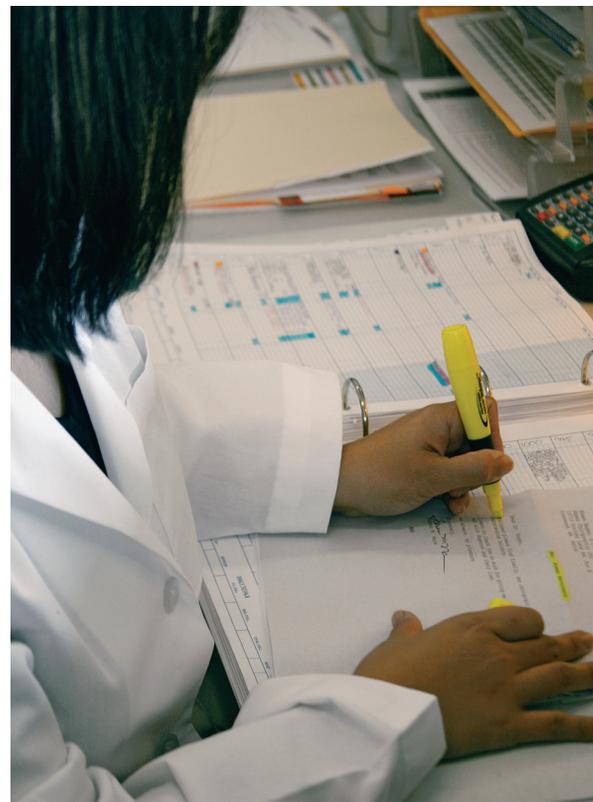
organizations. The office manager, by contrast, may receive all bills, advertisements for services or supplies, and samples from drug or supply companies.

## HIPAA Compliance

Because many items sent to the medical office contain private patient information, mail should never be left where other people can access it, even when unopened.

### Annotation

To abbreviate their reviews of the information they receive, some physicians charge their administrative medical assistants with **annotation**, a process that involves reading, highlighting, and summarizing information. Medical assistants who annotate should clarify the information physicians consider pertinent before they undertake the task (Figure 7-18 ■). Typically, the physician will ask the medical assistant to highlight the patient's name, any pertinent information about the patient, such as a diagnosis or treatment plan, and the name of the sender of the letter.



**Figure 7-18** ■ The medical assistant may be asked to open and annotate portions of the physician's incoming mail.

Source: Pearson Education/PH College. Photographer: Dylan Malone.

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## PROCEDURE 7-6 Open and Sort Mail

## Theory and Rationale

The medical office receives various kinds of mail daily. Some mail contains important, private patient information, whereas other is considered “junk.” The medical assistant will likely need to learn to sort mail properly.

## Materials

- A stack of incoming mail, including payments from insurance companies and patients, advertisements, drug samples, magazines, professional journals, bills for office services, a letter to the physician marked “Personal and Confidential,” and consultation reports from other physicians
- Date stamp
- Letter opener

## Competency

1. Using a date stamp, stamp the date on each received item.

2. Sort the mail into the appropriate files according to the following:
  - **Physician**— correspondence from other physicians, hospitals, or laboratories, as well as any professional journals
  - **Office manager**— bills for office services, drug samples, advertisements for supplies or services
  - **Receptionist**— magazines
  - **Billing office**— payments from patients or insurance companies, correspondence from insurance companies
3. Open each piece of mail, except for the piece marked “Personal and Confidential.”
4. Distribute the mail appropriately. Leave the mail piece marked “Personal and Confidential” on the physician’s desk.



## PROCEDURE 7-7 Annotate Written Correspondence

## Theory and Rationale

In a busy medical office, the physician may want to save time by having the medical assistant scan and annotate medical reports. Medical assistants who know what information to look for save time for the physician and can point out key pieces of information.

## Material

- Written correspondence
- Highlighter pen
- Letter opener

## Competency

1. Open the envelope with the document to be annotated.

2. Read the document once in its entirety.
3. Using the highlighter pen, review the document again, highlighting such pertinent information as:
  - Patient’s name
  - Findings of any examination or laboratory work
  - Dates for followup appointments
  - Diagnosis
4. Read the document a third time to ensure all pertinent information has been noted.
5. Place the annotated document on the physician’s desk for review.

# REVIEW

## Chapter Summary

- Proper grammar, spelling, and punctuation are all paramount to a medical office's positive image.
- Medical assistants should follow a defined process when composing letters to patients and other members of the health care team.
- Medical assistants must be familiar with the use of a medical dictionary.
- The proofreading of business letters, which involves attention to detail as well as a solid understanding of English essentials, is a means by which the medical assistant can help support a positive professional image for the office.
- In all correspondence, medical assistants should use only abbreviations that are accepted in the health care industry.
- Memos are one vehicle health care staff can use to communicate with other team members.
- The U.S. mail system is governed by a set of rules and restrictions the medical assistant should be familiar with to function as part of the health care team.
- E-mail is governed by its own unique set of rules and policies.
- The medical assistant is responsible for managing incoming mail and correspondence according to office policy.
- The medical assistant may be called upon to annotate the physician's mail correspondence.

## Chapter Review

### Multiple Choice

1. Which of the following USPS mail types is appropriate for mailing a DVD?
  - a. Media
  - b. Priority
  - c. Express
  - d. Ground
  - e. Overnight
2. Which of the following mail types is appropriate for sending a letter that must arrive the next day?
  - a. Media
  - b. Priority
  - c. Express
  - d. Ground
  - e. Transit
3. A piece of mail marked \_\_\_\_\_ should be left unopened and given directly to the intended recipient.
  - a. "Open Immediately"
  - b. "Personal"
  - c. "Important"
  - d. a and b
  - e. a, b, and c
4. Which of the following substances is prohibited by the USPS for mailing?
  - a. Alcoholic beverages
  - b. Firearms
  - c. Flammable material
  - d. a and b
  - e. a, b and c
5. In the medical office, it is appropriate to use a memo when the:
  - a. Office manager wishes to notify staff of a holiday party
  - b. Medical assistant must notify a patient of a missed appointment
  - c. Physician would like to contact a patient with test results
  - d. Physician would like to publish a column in the local newspaper
  - e. Nurse would like to make a notation in a patient's chart

### True/False

- T F 1. Any written correspondence in the medical office reflects on the physician and the office.
- T F 2. As a general rule, numbers from one to ten should be written out when writing letters.

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- T F **3.** The physician is responsible for managing incoming mail and correspondence.
- T F **4.** “Miss” is the appropriate title to use when addressing a woman of unknown marital status.
- T F **5.** The most common salutation in professional letters is “Yours Truly.”
- T F **6.** E-mail is a secure way to send patients test results.

**Short Answer**

1. What is the purpose of the subject line in a professional letter?
2. What is a typical closing in a professional letter?
3. What are the reference initials for Mark S. Stevens, MD, who authors a letter, and medical assistant Sarah Ellen Parker, who types it?

4. Which three fonts appear most often in a business letter?
5. Explain the process of annotation.
6. Describe the function of spell-check software.
7. Give several examples of words in English that sound the same yet have different meanings.
8. What is a logo, and why is it used?

**Research**

1. What classes could you take at your local community college to help improve your written communication skills?
2. Looking at the USPS Web site, how would you calculate postage to various locations throughout the United States? Outside the United States?
3. Review the Web sites for both FedEx and UPS. Compare their services. Does either offer a service the other does not?

## Practicum Application Experience

When Dr. Yi asks office manager Marnie Glaser, CMA (AAMA), to open and distribute the day’s mail, Marnie

accidentally opens a piece to Dr. Yi marked “Personal.” What is the proper way to handle this situation?

## Resource Guide

**United States Postal Service**

Phone: (800) 275-8777  
www.usps.com

**Federal Express**

Phone: (800) GO-FEDEX  
www.fedex.com

**United Parcel Service**

Phone: (800) PICK-UPS  
www.ups.com

**DHL**

Phone: (800) CALL-DHL  
www.dhl-usa.com