

PowerPoint® to accompany
Medical Assisting

Chapter 7

Second Edition

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Chapter
7



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Managing Correspondences and Mail

Objectives

- 7-1 List the supplies necessary for creating and mailing professional-looking correspondence.
- 7-2 Identify the types of correspondence used in medical office communications.
- 7-3 Describe the parts of a letter and the different letter and punctuation styles.
- 7-4 Compose a business letter.

Managing Correspondences and Mail (cont.)

Objectives

- 7-5 Explain the tasks involved in editing and proofreading.
- 7-6 Describe the process of handling incoming and outgoing mail.
- 7-7 Compare and contrast the services provided by the U.S. Postal Service and other delivery services.

Choosing Correspondence Supplies

Letterhead Paper

Envelopes

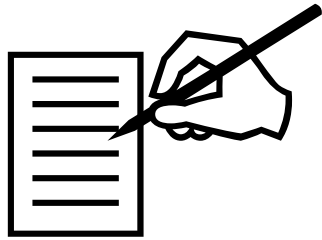
Supplies

Labels

Statements

Invoices

Correspondence and Professionalism

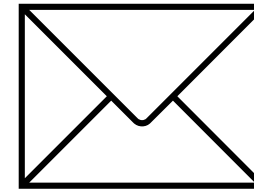


Create

Send

Medical Practice, Inc.
111 One Dr.
Any, St. 11111

Mr. Some One
10 Any Lane
Any, State 11111



Receive

It is essential that medical assistants learn to:

- ✓ **Create**
- ✓ **Send**
- ✓ **Receive**

well-written, neat correspondences to ensure that a positive, and professional image is communicated for the medical office.

Choosing Correspondence Supplies (cont.)

Letterhead Paper

Description

- Refers to formal business stationary
- Doctor's(s) or office name, address, and phone number usually printed at the top
- Used for correspondences with patients, colleagues and vendors

Types

Cotton Bond (Rag Bond)

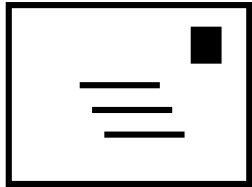
- Contains cotton & chemically treated wood pulp
- Contains a watermark & is a more expensive paper

Sulfite Bond

- Made from chemically treated wood pulp
- Has 5 grades of quality

Choosing Correspondence Supplies

(cont.)



Envelopes

No. 10

- Most common
- Used for correspondence
- Measures 4 1/2 by 9 1/2

Invoice

- Used for invoices or statements
- Range from No. 6 (3 5/8 by 6 1/2 inches) to No. 10
- Has a transparent window

Tan kraft

- Clasp envelopes
- Used to send large or bulky documents

Padded

- Used to send slides or other materials that might become damaged

Choosing Correspondence Supplies

(cont.)

Labels

Printed computerized address labels can save a large amount of time.

Invoices & Statements

Types used today include:

- Preprinted invoices (to send an original bill)
- Preprinted statements (used to send reminders of bills past due)
- Computer-generated invoices & statements
- Superbills
- Data mailers

Apply Your Knowledge

The medical assistant has been requested to mail the insurance contractual agreement back to the insurance company. This is a 22-page document. Which of the following envelopes should be used?

A. No. 6

B. Tan kraft

C. No. 10

Apply Your Knowledge -Answer

The medical assistant has been requested to mail the insurance contractual agreement back to the insurance company. This is a 22-page document. Which of the following envelopes should be used?

A.No. 6

B.Tan kraft

C. No. 10

This would be a rather “bulky” document so a standard envelope will not work.

Written Correspondence

- The purpose of most letters is to **explain, clarify or provide information** for:
 - Referrals
 - Scheduling
 - Patient Reports
 - Patient Education
 - Insurance/Billing Information
 - Cover or Form Letters

Written Correspondence (cont.)

Parts of a Business Letter

Dateline

- Has month day & year
- Begins 3 lines below letterhead text on line 15.

Inside Address

- Includes information needed for correct delivery (i.e. title, address, city & state, etc.).

Attention Line

- Used when letter is sent to specific person in a company.

Salutation

- Written greeting such as “*Dear*”.

Written Correspondence (cont.)

Parts of a Business Letter

Subject Line

- Typed two lines below salutation & two lines above body
- Used to bring attention to subject

Signature Block

- Places writers name on 1st line & business title on 2nd line

Body

- Begins two lines below salutation
- Text is single-spaced and double-spaced between paragraphs

Complimentary Closing

- Placed two lines below body
- “Sincerely” is commonly used

Written Correspondence (cont.)

Parts of a Business Letter

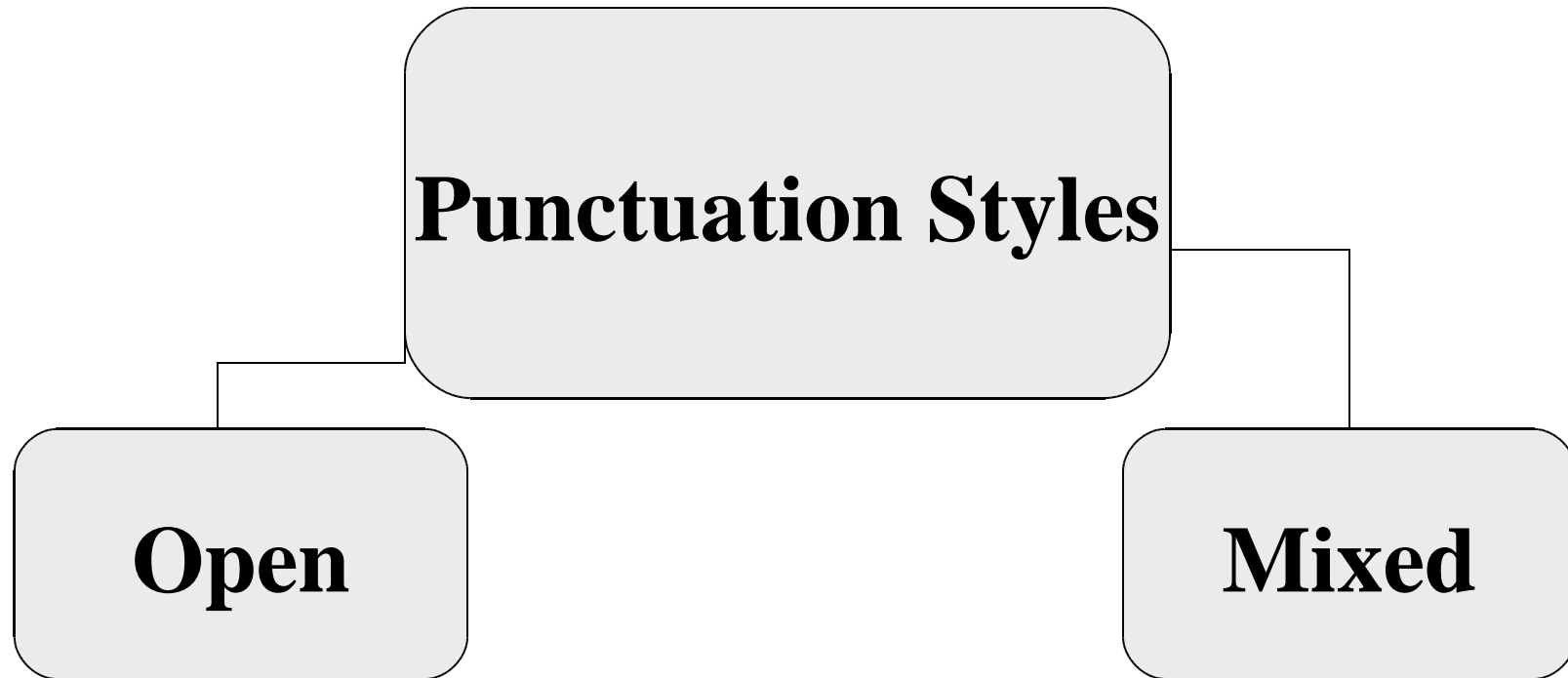
Identification Line

- Consists of the letter writer's initials followed by a colon or slash mark along with the typist's initial
- Is typed two lines below the signature block and flush to the left

Notations

- May be abbreviated as *Encl*, *Enc*, or *Encs*
- Copy notation (*cc*) appears after the enclosure notation
- Includes information such as number of enclosures and letter recipients

Written Correspondence (cont.)



Written Correspondence (cont.)

- **Open Punctuation** uses no punctuation after these items in a letter:
 - **The word *Attention* in the attention line**
 - **The salutation**
 - **The complimentary closing**
 - **The signature block**
 - **The enclosure and copy notations**

Written Correspondence (cont.)

- **Mixed Punctuation** includes the following:
 - **A colon after *Attention* in the attention line**
 - **A colon after the salutation**
 - **A comma after the complimentary closing**
 - **A colon or period after the enclosure notation**
 - **A colon after the copy notation**

Written Correspondence (cont.)

Letter Format

- ☞ One-inch margins on the left & right with 8 ½ inch paper
- ☞ Letter should be centered according to length
- ☞ Single-space body of letter and double-space between paragraphs
- ☞ Short sentences no greater than 20 words on an average
- ☞ Have at least two sentences per paragraph
- ☞ Divide paragraphs longer than 10 lines into two paragraphs.
- ☞ For multi-page letters use letterhead first page only.

Written Correspondence (cont.)

Letter Style	Description
Full-Block	<input type="checkbox"/> Lines are typed flush left, no indented paragraphs
Modified-Block	<input type="checkbox"/> Dateline, complimentary closing, signature block & notations are aligned at the center of page or to the right.
Modified-Block with indented Paragraphs	<input type="checkbox"/> Paragraphs are indented
Simplified	<input type="checkbox"/> Most modern letter style <input type="checkbox"/> No salutation, courtesy title or closing <input type="checkbox"/> Has a subject line in all capital letters

Apply Your Knowledge

What should the medical assistant do if a mailing is to be sent to an organization to request x-ray films but no specific name or title is given to address it to? Which of the following would you use?

- A. To Whom It May Concern**
- B. Attention: To Whom It May Concern**
- C. Dear Sir/Madam**
- D. Dear Radiology Department**

Apply Your Knowledge -*Answer*

What should the medical assistant do if a mailing is to be sent to an organization to request x-ray films but no specific name or title is given to address it to? Which of the following would you use?

A. To Whom It May Concern

B. Attention: To Whom It May Concern

C. Dear Sir/Madam

D. Dear Radiology Department

Effective Writing

- Identify your reading audience to determine tone of letter (formal or relaxed)
- Be clear and concise
- Use active voice when possible (passive voice is best when relaying negative news)
- Be polite and courteous
- Check spelling and content accuracy like with dates and monetary figures

Editing and Proofreading

Dictionary

Medical Dictionary

**Tools for Editing
And Proofreading**

**Physician's Desk
Reference (PDR)**

**English Grammar &
Usage Manual**

Word Processing Spell Checkers

Editing and Proofreading (cont.)

Editing

- Language Usage
 - Employ basic grammar rules
- Content
 - Content should follow a logical progression
 - Use an appropriate writing style

Proofreading

- Proofreading
 - Check the document for errors after you have put it aside
 - Also ask a coworker to proof your work if possible
 - Three types of errors:
- Formatting Errors
- Data Errors
- Mechanical Errors

Apply Your Knowledge

A letter must be sent to current employees that have exceeded their number of absences according to office policy. Which of the following would be most appropriate.

- A. Dear _____, The attendance policy of this office requires that....
- B. Dear _____, You have violated the attendance policy of this
- C. Dear _____, Are you aware that you have missed “X” days....

Apply Your Knowledge -*Answer*

A letter must be sent to current employees that have exceeded their number of absences according to office policy. Which of the following would be most appropriate.

- A. Dear _____, The attendance policy of this office requires that....
- B. Dear _____, You have violated the attendance policy of this
- C. Dear _____, Are you aware that you have missed “X” days....

This correspondence must communicate the facts in a soft manner while getting one’s point across. The first response begins with identifying the “fact” or policy followed by the individual’s performance and is less subjective or punitive.

Preparing Outgoing Mail

□ **Signing Letters**

- If you sign for the doctor place your initials after the doctor's signature

□ **Preparing the Envelope**

- Use USPS guidelines for addressing envelopes

□ **Folding and Inserting the Mail**

- Type of envelope determines the way a letter should be folded (folded in thirds, in half etc.)

Mailing Equipment and Supplies

Airmail

Priority Mail

Registered Mail

**Common
Mailing
Supplies
For:**

Private Delivery
Companies

Express Mail

Certified Mail

Mailing Equipment and Supplies (cont.)

□ Airmail Supplies

- Letters and packages must be labeled “**AIRMAIL**” on all sides

□ Envelopes for Overnight Delivery Services

- USPS and other companies require the use of their own mailing materials for next day delivery




□ Postal Rates, Scales and Meters

- Rates and regulations change periodically so keep current rates on-hand at the medical office



U.S. Postal Service Delivery

Regular Mail Service

First Class

-  • Must weigh no more than 11 oz
-  • Cost is based on weight
-  • Mail is forwarded at no extra cost




Fourth Class

-  • Also called *parcel post* & is used for items weighing between **1 lb** and **70 lbs**
-  • Rates are based on weight and distance






U.S. Postal Service Delivery

Regular Mail Service (cont.)

Priority Mail

-  • Useful for heavier items requiring faster delivery
-  • USPS offers a flat rate for any items that can fit into the priority envelope
-  • USPS guarantees delivery within 2-3 days

Express Mail

-  • The quickest USPS service
-  • Delivery service available everyday
-  • Rates vary with weight
-  • Items automatically insured against loss or damage
-  • Special flat rate also available

U.S. Postal Service Delivery (cont.)

Special Postal Services

- **Special Delivery**

- Deliveries made before regular mail delivery
- Limited hours and distance limits availability

- **Certified Mail**

- Offers a guarantee that the item has been received
- Requires signature of recipient

- **Return Receipt Requested**

- Offers proof of who received the item and when they received it

- **Registered Mail**

- Used to send valuable, important items
- Evidence provided of mailing and delivery to sender
- First-class and priority mail can be registered

U.S. Postal Service Delivery

Special Postal Services (cont.)

International Mail

- USPS offers surface and airmail services to most foreign countries
- International mail classes are similar to domestic mail

Tracing Mail

- Service used if a piece of certified or registered mail does not reach its destination on time
- The original receipt must be presented to locate the item

Other Delivery Services

Delivery Service	Description
United Parcel Service (UPS)	<ul style="list-style-type: none"><input type="checkbox"/> Provides overnight letter and express services<input type="checkbox"/> Packages insured
Express Delivery Services	<ul style="list-style-type: none"><input type="checkbox"/> Federal Express<input type="checkbox"/> Airborne
Messengers or Carriers	<ul style="list-style-type: none"><input type="checkbox"/> Delivers items locally on the same day

Apply Your Knowledge

Which type of mail would you use to send each of the following:

Confidential Laboratory Results →

Signed and dated contract materials →

Patient Invoice and Billing Statements →

- A. First Class Mail
- B. Priority Mail
- C. Certified Mail
- D. Registered Mail

Apply Your Knowledge -*Answer*

Which type of mail would you use to send each of the following:

Confidential Laboratory Results → “C or D”

Signed and dated contract materials → “C or D”

Patient Invoice and Billing Statements → “A”

A. First Class Mail

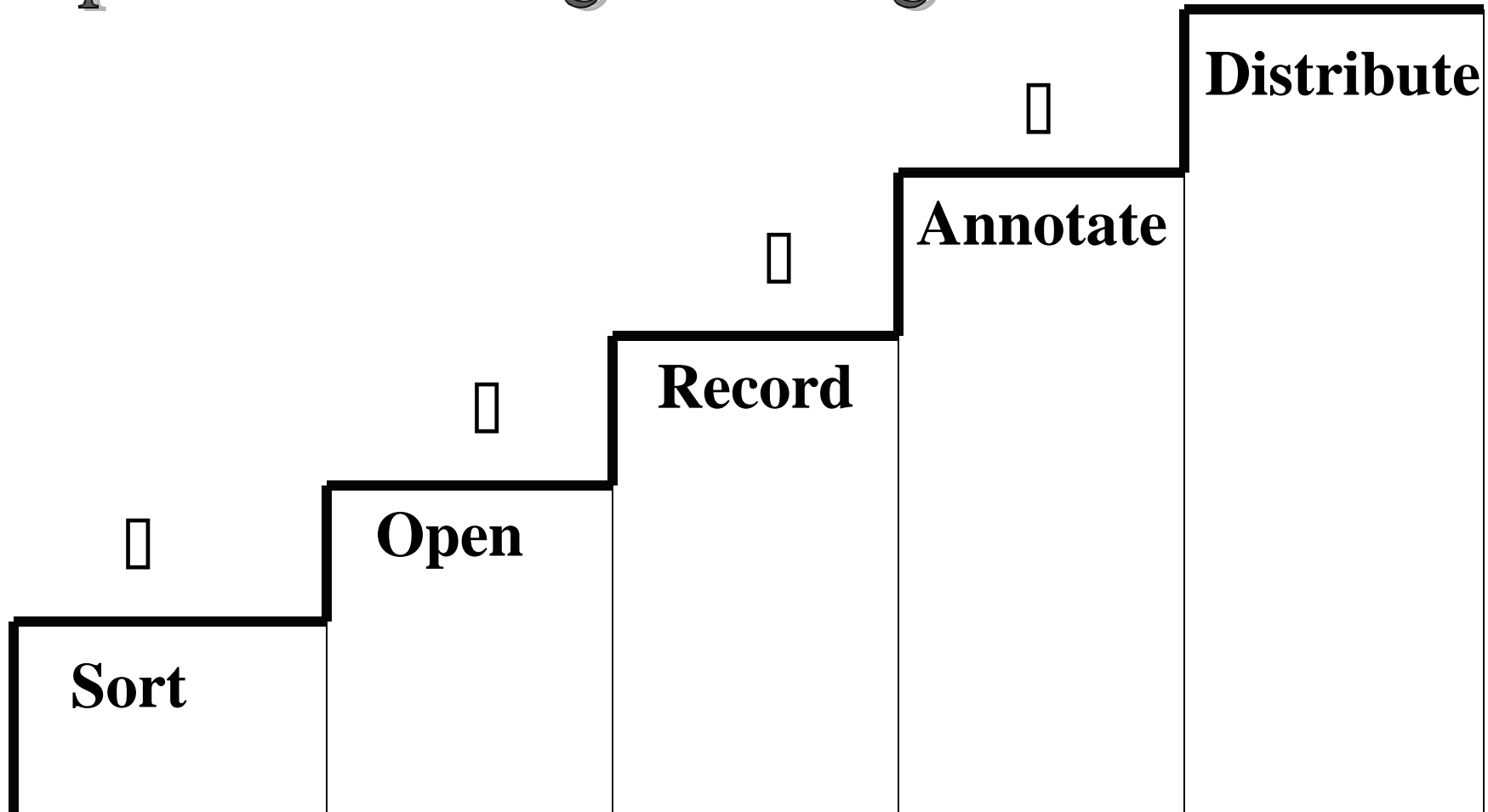
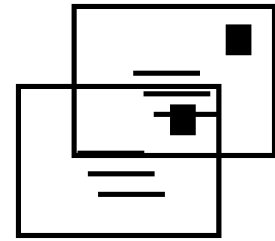
B. Priority Mail

C. Certified Mail

D. Registered Mail

Processing Incoming Mail

Steps to Processing Incoming Mail



Processing Incoming Mail (cont.)

Steps to Processing Incoming Mail

Sorting and Opening

- Mail is often sorted according to its priority
- ***Do not*** sort mail in a cluttered area

Annotating

- Outlining key points and documenting reminders from the correspondence

Recording

- By keeping a log of daily mail, it can be traced as to when received and when correspondences were sent if needed

Distributing

- Sorting and delivering items to mail recipients
- Order in terms of priority

Processing Incoming Mail (cont.)

Handling Drug and Product Samples

Do



- Place only nonprescription products according to office policy in patient areas
- Sort and store other prescription items in locked cabinet
- Destroy out-dated samples

Do Not

- Give patients sample without the physician instructing you to do so
- Fail to document in patient record when samples are given per the physician request
- Discard medication samples in trash cans

Apply Your Knowledge

The medical assistant has been instructed to give a patient some medication samples. The patient indicates she will not be able to purchase her blood sugar medications for another two weeks. Since the physician is providing her with enough samples to last two weeks, what should the medical assistant do after giving the samples, and why?

Apply Your Knowledge -*Answer*

The medical assistant has been instructed to give a patient some medication samples. The patient indicates she will not be able to purchase her blood sugar medications for another two weeks. Since the physician is providing her with enough samples to last two weeks, what should the medical assistant do after giving the samples, and why?

Give the quantity of medication as instructed by the physician then document and date this in the patient's record for future reference. Also, depending on office policy and remaining quantity, the remaining blood sugar pills may need to be destroyed.

End of Chapter

End of Chapter

