Component II: Administrative

Module B: Medical Office Records

Topic 2: Mail and Correspondence

Statement of Purpose
To prepare the learner with basic knowledge and skills necessary to process mail and correspondence.

Student Learning Outcomes
Upon completion of this topic, the learner will be able to:

1. Spell and define key terms.
2. Identify methods and equipment needed for postage and mailing.
3. Select the correct level of mail delivery services offered by the United States Postal Service.
4. Discuss alternate types of mail delivery.
5. Rank the order of importance in sorting and distribution of mail.
6. Review and discuss rules of proofreading for grammar, spelling, and punctuation.
7. Describe methods of electronic communications.
8. Identify letter, memo, fax, and email styles and components of correspondence.
9. Identify different types of incoming mail.

Terminology
1. Addressee
2. Annotation
3. Certified mail
4. Classes of mail
5. E-mail
6. Enclosure
7. Express mail
8. Facsimile (FAX)
9. Federal Express (FedEx)
10. Full block
11. Header
12. Instant message
13. Letterhead stationery
14. Postage meter
15. Postmark
16. Postscripts
17. Punctuation
18. Recipient
19. Reference initials
20. Registered mail
21. Return receipt
22. Salutation
23. Text message
24. United Parcel Service (UPS)
25. United States Postal Service (USPS)
26. Voice mail
27. Watermark

References
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Content Outline/Theory Objectives	Suggested Learning Activities

Objective 1
Spell and define key terms
    A. Review the terms listed in the terminology section.
    B. Spell the listed terms accurately.
    C. Pronounce the terms correctly.
    D. Use the terms in their proper context.
	A. Games: word searches, crossword puzzles, Family Feud, Jeopardy, bingo, spelling bee, hangman, and concentration.
	B. Administer vocabulary pre-test and post-test.
	C. Discuss learning gaps and plan for applying vocabulary.

Objective 2
Identify methods and equipment needed for postage and mailing.
    A. Stamps; paper and online postage.
    B. Postage scale device used to weigh mail and display postage
        1. Electronic.
        2. Manual.
    C. Postage meter machine applies postage to an envelope and/or prints label to apply to a package
        1. Eliminates need for stamps.
        2. Cost effective and efficient.
        3. Seals envelope.
        4. Prepare postage
            a. Meter taken to local post office.
            b. On-line charge option.
            c. Able to check remaining postage available.
        5. Eliminates need for postmark and cancellation marks as documentation.
	A. Lecture/Discussion
	B. Assigned Readings
	C. Have students visit the local post office and obtain blank forms for priority, express, certified, and return receipt.
	D. Have students go online to the US postal service website to research postal options. www.usps.com

Objective 3
Select the correct level of mail delivery services offered by the United States Postal Service.
    A. Mail is classified according to type, weight and destination. Maximum weight is 70 pounds.
    B. First class
        1. The most common and fastest service.
        2. Will accommodate up to eleven ounces.
        3. Postal card no larger than 4 ½ inches by 6 inches, no smaller than 3 ½ inches by 5 inches.
        4. Examples of mail in this category are payments from insurance companies and patients, laboratory reports, hospital and physician correspondence and consultation reports.
        5. Mail over eleven ounces is considered priority mail
    C. Second class mail
        1. Not as likely to be used but may be received at the office.
	A. Lecture/Discussion
	B. Assigned Readings
	C. Have students research the cost of sending one domestic letter and package and one international letter and package and choose the best option for delivery time and cost.

2. Newspapers and periodicals.
3. Must be issued at least four times a year to be eligible for this rate.

D. Third class mail
1. Not likely to be used but will be received at the office.
2. Newsletters, circulars, printed booklets, catalogs.
3. Weight up to sixteen ounces.
4. If over sixteen ounces, it must be mailed fourth class.
5. Nothing is written on outside except date and address (no personal correspondence).

E. Fourth class
1. Commonly known as parcel post.
2. Bound material such as books, manuscripts, and sound recordings.
3. Packages from one to seventy pounds are mailed in the United States.
4. Address must be clear and readable from a distance of 30 inches.
5. Special fourth class for educational materials
   a. Minimum of 24 pages.
   b. Contains no advertising.

F. Certified mail
1. Used to prove a piece of mail has been delivered to the intended recipient; signature required.
2. Commonly used for collection purposes and letters of patient dismissal.
3. Sender is provided with a receipt.
4. Additional fee charged for a return receipt.
5. Delivery can be tracked on the website.

G. Combination mailing
1. A first class letter sent with a parcel.
2. Letter attached to outside.
3. Letter placed inside (x-rays).
4. Packages received at home with a bill attached, such as a book.

H. Express mail
1. Fastest and most reliable shipping with guaranteed overnight delivery.
2. It is the most expensive.
3. 11 ½" x 14" envelopes are used.
4. If not delivered on time, postage is refunded.

I. Registered mail
   First class mail with a monetary value associated with it.
1. Fee depends on the declared value of items being mailed.
2. Guarantees extra security such as locked mail bags or signed releases for each step in the mail process.

J. Return receipt
    1. Proof that a mailed item was received by the addressee.
    2. Addressee must sign for mail and slip is returned to the sender.
    3. Signed slip is placed in patient's medical record.
K. Delivery Confirmation
    1. Tracks priority mail from sender to recipient.
    2. Can be tracked on the website.
L. Proof of mailing stamped with date and place of mailing for proof of sending.
M. International Mail
    1. Size and weight.
    2. Correct address notation.
    3. Fees.
N. Special notations for mail envelopes or packages
    1. Personal.
    2. Confidential.
    3. Special delivery.
    4. Certified mail.
    5. Photo enclosed.
    6. Hand cancel.
    7. Urgent.
    8. Do not bend.
    9. Fragile.
    10. Attention.	

Objective 4
Discuss alternative types of mail delivery.
    A. Types of mail delivery
        1. United Postal Service (UPS).
        2. Federal Express.
        3. DHL.
        4. Airborne Express.
        5. Other private delivery services.
    B. All charge a fee and tracking is available.
	A. Lecture/Discussion
	B. Assigned Readings
	C. Have students research of sending a package through each service to compare costs and delivery options.

Objective 5
Rank order of importance in sorting and distribution of mail.
    A. Letters marked "personal or "confidential"
        1. Follow office protocol.
        2. If opened by mistake, use clear tape to seal and write "opened by mistake" and your initials.
    B. Supplies needed to open mail
        1. Letter opener and cutter.
        2. Staple remover.
        3. Paper clips.
        4. Date stamp and ink pad or time stamp machine.
    C. Opening letters
        1. Tap lower end of envelope on desk so contents settle.
        2. Open by holding in non-dominant hand and slide
	A. Lecture/Discussion
	B. Assigned Readings
	C. Have a basket of office supplies, staples, paper clips, letter opener, and date stamp to display.
	D. Show samples of documents and mail and have students identify the sorting and distribution protocol.

opener along sealed edge with dominant hand.
3. Remove contents.
4. Hold up to light to check that all contents are removed.
5. Stamp dates in upper right corner.
D. For typical types of mail received and handled by the Medical Assistant, the priority of placement and disbursement depends on each facility
1. Laboratory results, x-ray reports, consultations, physical therapy reports, written prescription requests for physician signature, confirmation of orders from convalescent or skilled nursing facilities, journals, magazines for reception area or physician and advertisements.
2. Annotation follows office protocol, such as highlighting important words or phrases.
E. Check for notations on letter of enclosure. If documents are missing write "not enclosed" opposite to their reference in the letter and contact sender.
F. Stack and distribute to appropriate personnel.

Objective 6
 Review and discuss rules of grammar, spelling, and punctuation.
 	
 A. Nouns are a person, place, object or occurrence (the *assistant* opens *mail* and distributes it to the correct *personnel*).
 B. Pronouns are used as a noun substitute (I, he, she, me, her, you, him, who, which, one, their, and others).
 C. Verbs are words or groups of words used to express an action such as (write, speak, do, perform, assist, attend, are, and appear). Every true sentence must have one.
 D. Adjectives restrict, describe, and/or limit nouns or pronouns (efficient, dedicated, conscientious, and knowledgeable).
 E. Adverbs modify verb forms and adjectives and often end "ly" (quickly, sloppily, carefully).
 F. Prepositions show relationships to another object (for, between, with, above, below, against, by, on).
 G. Conjunctions join words, clauses or phrases (if, and, but, or, nor).
 H. Interjections express feelings or emotion (well, hurray, oh, yes). An exclamation mark is often used!
 I. Sentence structures must have agreement of subject and verb
     1. Simple sentences are one complete thought.
     2. Compound sentences have two or more
	A. Lecture/Discussion
	 B. Assigned Readings
	 C. Have students compose sentence, and diagram the sentence.
	 D. Give students a document to proofread and correct for grammar, punctuation, and sentence structure.
	 E. Refer students to office writing guides for help in proofreading for correct usage.
	 F. Show proofreading tools in all word processing applications.

salutation and complimentary closing of a letter, names and days of the week, month, and holidays and abbreviations when the words they represent are capitalized, (M.D.). L. Numbers, spell out number below ten and use numeric form for those above ten, never begin a sentence with an Arabic number. Outlines can use numerals 1 to 10. If multiple numbers used in a sentence, higher number format will be used. M. Spelling, use a dictionary and online usage tools to proofread all documents.	

Objective 7
Describe methods of electronic communications.
    A. FAX machine
       1. Sends and receives information over the telephone line or secure email.
       2. Use a cover sheet.
       3. Place confidentiality statement on cover sheet.
    B. Electronic mail or e-mail is sent through the Internet using an email application.
    C. Voice mail telephone systems
       1. Follow HIPAA guidelines when leaving messages for patients.
    D. Review messages from patients in a private area.
    E. Instant messaging.
    F. Follow office protocol for secure messages.
	A. Lecture/Discussion
	B. Assigned Readings
	C. Have students report on each of the methods of communication and procedures for sending and receiving documents.

c. If not preprinted, address is placed on a line three and one-half inches from left edge of the return address.
       d. Special instructions a double space below the return address on left side of envelope.
       e. Mailing instructions placed on right side of envelope a double space below return
	A. Lecture/Discussion
	B. Assigned Readings
	C. Have students address two typed and two hand-written envelopes, and correctly fold

address.

      f. Addressee area centered 2" down with at least 1" on each side, and no larger than 2 ¾." Label of recipient address placed in this location.

B. Letter styles
1. Full block requires that each part of the letter is typed at the left margin.
2. Modified block requires the date, complimentary close, and typewritten name to start at the 3 inch mark on the ruler line at the top of the screen; all other parts typed at left margin.
3. Modified block with indented paragraphs same as above, only each paragraph is indented.
4. AMS style follows block style format but deletes the greeting and closing.

C. Parts of letter
1. Date, 3-4 lines below letterhead (can be adjusted to allow only one page for letter).
2. Inside Address, three or four lines below date
      a. Give name, address, city, state, and zip code of person or firm where letter is being sent. Do not abbreviate titles.
      b. Use only the approved USPS two letter state abbreviations.
      c. Foreign countries spelled out in all capital letters.
3. Attention or Subject Line is a double space below inside address.
4. Greeting is a double space below the attention/subject line
      a. If there is no attention/subject line, greeting is a double space below the inside address.
      b. Greetings are determined by familiarity with recipient, formal name with title, or first name not both.
      c. Body of letter starts a double space below the greeting.
      d. Business letters use three paragraphs. The first states reason for writing, the second explains the main facts, and the third paragraph is a summary and signing off.
5. Double space between paragraphs.
6. Double space below last paragraph for complimentary close. The choice of closing reflects the relationship between recipient and writer
      a. "Sincerely" is used for those who have met and know each other.

correspondence.

D. Have students compose letters of welcome, follow-up, withdrawal, collection, and consultation letters.
E. Have students compose a memo to all employees.
F. Have students compose appropriate emails for internal and external distribution.

b. "Respectfully" is sent to a person of honor.
7. Sender's name four lines below the complimentary close. Leave space for sender to sign their name and then type the name.
8. Title (if appropriate). Next line type title of sender.
9. Reference initials of typist are typed a double space below the title or name line. This is important for the physician or office manager to know if they have a question about the letter.
   a. First set of initials is individual dictating letter and is shown in upper case initials.
   b. Second set of initials (lower or upper case) is the person responsible for typing the letter.
10. Enclosure or attachment notation below reference initials. (E.g. Attachments, Enclosure 2, and Enclosure: Laboratory report.)
11. Copy notations (single letter c followed by a colon) are used when several copies have been made to be mailed to other people other than the person on the inside address
   a. Names are given in alphabetical order c: Lorraine Bells, RPT.
   b. Use single or double line spacing after enclosure.
   c. Blind copy (bcc) notations are placed ONLY on the file copy of the letter. The recipient does not know that this person has received a copy of the letter.
12. Multi-page letter typed on plain bond and noted at least two lines down from next page.
   a. Example:
      • RE: Lorraine Bells
        Page 2
        June 2, 2013
   b. Second page notation may also be typed on the right on the first line of the second page.
13. Be sure to proofread.
D. Memorandum, sent ONLY within the office for internal messages. Memos are sent when information is to be saved, filed or needed for future reference. Emails have replaced memos for disposable message and FYI types of messages.
   1. Form, letterhead forms are also used for memos. Standard memo headings are:
      TO:
      FROM:
      DATE:

SUBJECT:

(Copy notations can appear below the subject line or at the bottom of the memo as in a letter.)

    a. To: list the names of the recipient(s). If there are many names on the distribution list, type the group name and list the individual names at the bottom of the memo. For example, TO: BILLING DEPARTMENT.

    b. From: list the name and title of the person sending.

    c. Subject: inserts a brief phrase describing the purpose.

2. Copy uses the same rules as for letters.
3. Salutations and closings are not used in memorandums.
4. If there is more than one paragraph in a memo, double space between the paragraphs. Do not indent paragraphs.
5. Memos are single spaced and typed block style at the left margin.
6. If typist is different from the sender of the memo, the reference initials should appear below the last line of the memo.
7. Enclosure or attachment notations appear below the reference initials.

E. Fax cover sheet can also be a letterhead form with all headings inserted in the form.

1. Name of the intended receiver of the fax.
2. Number of pages being sent, counting the cover sheet.
3. Telephone number of the fax machine of the intended recipient.
4. Date and time fax was sent.
5. Confidentiality statement.

F. Electronic mail (e-mail)

1. Use only informational messages. Can be sent to outside clients if content is appropriate. For example, generic appointment reminders can be sent through email.
2. Keep messages short and concise.
3. Flag messages of high importance.
4. Use appropriate fonts and font size.
5. Always complete the subject line.
6. Skip a line between paragraphs.
7. Add a permanent signature and include your name and phone number.
8. May attach a file but check attachment before sending to be sure it is the correct file.
9. Include confidentiality statement.
10. Comply with all HIPAA privacy regulations.

Objective 9
Identify types of incoming mail.
    A. Patient information mail
          1. General correspondence
          2. Payment for services
          3. Laboratory reports
          4. Hospital record components
          5. Authorizations and referrals
          6. Referral letters or reports from physicians
          7. Health insurance information
    B. Office operations mail
          1. Bills for office purchases
          2. Samples (drugs, laboratory test kits)
          3. Insurance
          4. Employee benefits information
    C. Physicians Physician mail
          1. Medical society mailings
          2. Professional journals
          3. Medical updates
          4. Personal mail
    D. General office mail
          1. Promotional literature and samples from pharmaceutical manufacturers
          2. Advertisements
          3. Newspapers
          4. Magazines

A. Lecture/Discussion
B. Assigned Readings
C. Have students identify the procedures and distribution of a list of items received in the mail.
D. Discuss definition of "junk" mail and who determines what to discard.