

STORAGE OF BUSINESS RECORDS

OUTLINE

Preparing Records for Filing

Filing

Retention of Records

Filing Systems

Classification of Filing Systems

Selecting the Appropriate Filing System

Electronic Files

Storage Equipment

Storage Supplies

Managing Workstation Records Effectively

Summary

KEY TERMS

Alphabetical filing system

Card file

Chronologic filing system

Cross-referencing

Geographic filing system

Lateral file

Numeric filing system

Open-shelf filing

Retrieval

Subject filing system

Tickler file

Vertical file

LEARNING OUTCOMES

Mastery of the content in this chapter will enable the reader to:

- Define key terms
- Identify and distinguish among the different storage systems
- Apply basic alphabetical indexing rules
- Determine the most efficient storage methods for various documents in a message office
- Select supplies for the storage of records

Disposition by destruction or storage is the final stage of a massage record (see Chapter 7). This chapter discusses records storage. A massage practice produces many kinds of information, including clinical and financial records, correspondence, employee records, tax and insurance records, accounts receivable and payable records, and possibly Occupational Safety and Health Administration (OSHA) records. Inability to find a document quickly is frustrating. Although computer storage is becoming the method of choice, many forms of information are still on paper and need to be filed manually. To many massage therapists, filing is one of those dreaded, procrastinated, routine jobs done when you can “get around to it” or “have the time.”

Anyone with office experience knows that records must be readily available. Wise planning can save a tremendous amount of time and effort. The heart of any professional office is its filing system. Business office files should not be a place to *put* materials, but rather a place to *find* materials. A systematic plan for storage, retrieval, transferring, protection, and retention must be established. When planning for the office files, consider ease in retrieval, confidentiality, and safety. The needs of the office, the size of the massage practice, and the space available for equipment are determining factors in establishing an efficient filing system.

PREPARING RECORDS FOR FILING

Filing

Certain routines should be followed in preparing materials for filing:

1. Set aside some time each day or every few days for filing papers records.
2. Keep papers or records to be filed in a basket marked *To Be Filed*.
3. File electronic records immediately, and make backup copies of all electronic files as you complete them.

Before mastering the different filing systems, it is necessary to understand some basic steps, which usually are done in the order of inspecting, indexing, coding, sorting, and storing:

Inspecting: Review each record to determine if it is something that must be filed. If you are certain it can be disposed of, dispose of it. If it is to be retained, continue to the next step.

Indexing: Determine under which caption or name an item is to be filed. Indexing is a mental process that requires you to make a decision. For instance, if the record is a receipt for a payment that was just made from the massage therapist’s checking account, you must decide into which file to place the receipt. If files are organized by subject, you may file the receipt under the subject to which it pertains (e.g., a receipt for an electric bill may be filed under “utilities” or “electricity”). For a client’s clinical record, you

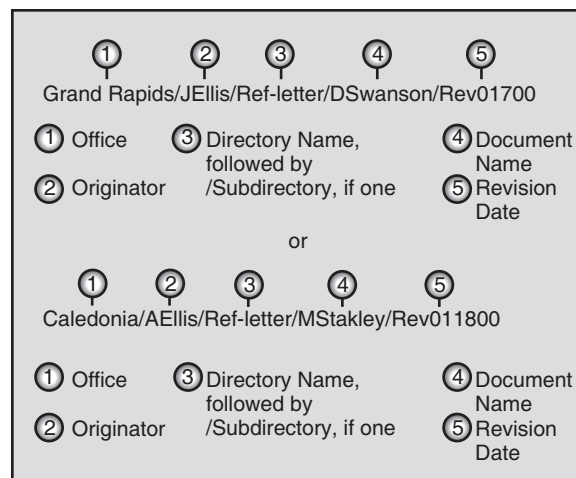


FIGURE 8-1. This figure provides an example of how documents are cross referenced in the computer so that they can be pulled up with multiple search terms. Electronic coding at the bottom of a document refers to the originator of the document, the directory name, the subdirectory (if used), and the document name. (From Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

commonly use an alphabetical system and break down the name into first, second, and third units to consider for filing. Electronic records are indexed by determining on what disk and in what directory the file should be located and by following a uniform procedure for naming the files. Do not name electronic files with characters or words that do not identify the subject of the record.

Coding: After you have determined the caption or title of the record, you must assign a code by highlighting, typing, or writing a caption on a paper record or by giving the electronic file a name. If an electronic file also exists in paper form, the file name on the document allows quick, easy retrieval. Examples of coding are shown in Figure 8-1. The clinical record is coded with the client’s name, and the electronic document is coded with the name of the originator and other important information about the document.

Sorting: The records are arranged in the order in which they are to be placed in the file (e.g., if the file is alphabetical, put the records in alphabetical order). Electronic files are sorted as you save the files in the correct directory or on the correct disk. The system then sorts the files for you alphabetically by file name, date, or any other designation you make.

Storing: Put documents in folders and bulkier records in file drawers. Check and double-check that you are filing a document correctly.

Two other aspects of document storage, cross-referencing and retrieval, deserve special consideration:

Cross-referencing alerts staff members that a record normally kept in a specific location has been stored elsewhere. A cross-reference can be provided by making a copy of the record and filing it in the referenced file with a note that it

is a copy, or a cross-reference sheet can be put in the file. A cross-reference sheet contains the name of the document, the date it was filed, a brief description of the subject of the record, and the places where the record could be found.

Retrieval is the removal of records from files using proper “charge-out” methods. When an entire file folder is removed, an out-folder is put in the place of the removed folder. The out-folder has the name of the individual or department that removed the folder and the date it was removed. Out-guides or substitution cards may be used instead of an out-folder. Although it does not commonly happen with clinical charts during routine massage session, a record may need to be removed from a file and used in another location for consultation or study. In such cases, the out-folder should denote the area to which the record has been taken.



SELF-REFLECTION

What do my personal files look like? What can be improved? Do I have a filing system, or is it a piling system? Are my records organized or thrown in a box? How will my management of personal records influence my business?

Retention of Records

It is not cost-effective to maintain unnecessary records and filing cabinets. Records are retained in accordance with state statutes. The National Archives and Records Service, a federal agency, has produced a helpful reference, *Guide to Record Retention Requirements*. It is available from the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. 20402.

Retention and destruction of files have taken on additional importance since the federal Revised Rule 26 of the Rules of Civil Procedure was approved in December 1993. This rule requires organizations to make available all relevant records that must be kept in compliance with prevailing statutes and regulations. Delay or failure to find information makes an office vulnerable to financial loss and adverse legal judgments(Box8- 1).



LEARNING ACTIVITY

Log onto at least three of the sites listed in Box 8-1, and summarize the content in terms of how you may need to use it below.

FILING SYSTEMS

Classification of Filing Systems

The five basic classification systems of filing are the alphabetical system, the geographic system, the numeric system, the subject system, and the chronologic system. All these methods except the chronologic system apply alphabetical procedures.

Selecting the Appropriate Filing System

ALPHABETICAL SYSTEM

In an *alphabetical filing system*, the arrangement of names appears in sequence from A to Z. This is the most common method used by massage therapist that are self-employed. The alphabetical filing system accounts for about 90% of the filing a person is likely to perform and can be applied to various captions. Standard rules exist for alphabetizing correctly. Box 8-2 illustrates alphabetical indexing rules applied to a variety of situations.

GEOGRAPHIC SYSTEM

In a *geographic filing system*, location is the important factor of reference. The principle of geographic filing is essentially the same as alphabetical filing, except that geographic filing is done by a territorial division (e.g., state, city, or street) rather than by name. Coding should be done in a manner similar to that of the alphabetical system by marking the caption under which the item will be filed(see Fig. 8-1).

NUMERIC SYSTEM

The *numeric filing system* uses a method of assigning numbers to each new client. Numbers assigned are then recorded on an alphabetical card index or computer file for future reference. Additional papers relating to the same person or account are subsequently filed according to the number originally allocated. In large clinics with access to computer centers, a numeric system can be used to great advantage because computers handle numeric data faster than alphabetical characters.

SUBJECT SYSTEM

The *subject filing system* is the alphabetical arrangement of papers according to the subject or topic of the papers. This system is used when it is more desirable to assemble information by topic than by name. For example, a subject file may be preferred if the massage therapist is involved in research or writing for publications. If a subject area is very broad, it can be broken down into smaller divisions by the use of secondary guides.

CHRONOLOGIC SYSTEMS

The *chronologic filing system* is a method of filing by date. It can be used within an alphabetical, geographic, subject, or numeric system by filing the most recent correspondence

BOX 8-1 Recordkeeping: Guidelines and Resources

The following information is useful in knowing what records to keep, and what records to shred, when running your own business. Use this as a resource as you start a new small business.

GUIDELINES FROM THE INTERNAL REVENUE SERVICE (IRS) ON RECORDKEEPING

(Information below from <http://www.irs.gov/businesses/small/article/0,,id=98513,00.html>)

The length of time you should keep a document depends on the action, expense, or event the document records. Generally, you must keep your records that support an item of income or deductions on a tax return until the period of limitations for that return runs out.

The period of limitations is the period of time in which you can amend your tax return to claim a credit or refund, or that the IRS can assess additional tax. The following information contains the periods of limitations that apply to income tax returns. Unless otherwise stated, the years refer to the period after the return was filed. Returns filed before the due date are treated as filed on the due date.

Note: Keep copies of your filed tax returns. They help in preparing future tax returns and in making computations if you file an amended return.

1. You owe additional tax and situations (2), (3), and (4), below, do not apply to you; keep records for 3 years.
2. You do not report income that you should report, and it is more than 25% of the gross income shown on your return; keep records for 6 years.
3. You file a fraudulent return; keep records indefinitely.
4. You do not file a return; keep records indefinitely.
5. You file a claim for credit or refund after you file your return; keep records for 3 years from the date you filed your original return or 2 years from the date you paid the tax, whichever is later.
6. You file a claim for a loss from worthless securities or bad debt deduction; keep records for 7 years.
7. Keep all employment tax records for at least 4 years after the date that the tax becomes due or is paid, whichever is later.

The following questions should be applied to each record as you decide whether to keep a document or throw it away.

ARE THE RECORDS CONNECTED TO ASSETS?

Keep records relating to property until the period of limitations expires for the year in which you dispose of the property in a taxable disposition. You must keep these records to figure any depreciation, amortization, or depletion deduction and to figure the gain or loss when you sell or otherwise dispose of the property.

Generally, if you received property in a nontaxable exchange, your basis in that property is the same as the bases of the property you gave up, increased by any money you paid. You must keep the records on the old property, as well as on the new property, until the period of limitations expires for the year in which you dispose of the new property in a taxable disposition.

WHAT SHOULD I DO WITH MY RECORDS FOR NONTAX PURPOSES?

When your records are no longer needed for tax purposes, do not discard them until you check to see if you have to keep them longer for other purposes. For example, your insurance company or creditors may require you to keep them longer than the IRS does.

ADDITIONAL GOVERNMENT RESOURCES

IRS Documentation Maintenance: (<http://www.irs.gov/businesses/small/article/0,,id=98575,00.html>)

Keeping records: (<http://www.irs.gov/businesses/small/article/0,,id=98862,00.html#6>)

OSHA recordkeeping guide: (<http://www.osha.gov/recordkeeping>)

Fair Labor Standards Act (FLSA) Recordkeeping Requirements: (<http://www.dol.gov/esa/regs/compliance>)

Audit Information related to Recordkeeping: (<http://www.sec.gov/rules/final/33-8180.htm>)

Department of Transportation (DOT) Recordkeeping Requirements: (<http://www.nhtsa.dot.gov/cars/rules/rulings/NAFTA/recordkeeping.htm>)

SMALL BUSINESS ASSOCIATION RESOURCES

General Recordkeeping Guidelines: (<http://www.sba.gov/library/pubs/fm-10.txt>)

Small Business Association's YouTube video: (<http://www.youtube.com/sba>)

Small Business Television: On SBTV.com you'll find: technical information on how to run your business; inspirational success stories from entrepreneurs across the country; information about small business conferences and associations; and resources that can provide you with the right solutions for your business. <http://www.sbtv.com>

BOX 8-2 Indexing Rules for the Alphabetical System

Names of individuals are indexed by units. The last name (surname) is the key unit, followed by the first name (given name), which is the second unit, and then by the middle name or initial, the third unit. Alphabetize names by comparing the first units of the names, letter by letter. Consider second units only when the first units are identical. Consider third units only if the first and second units are identical, and so on.

NAME	1	2	3
AliceJ .Goodi ng	Gooding	Alice	J.
Alice Marie Goodman	Goodman	Alice	Marie
William Grafton	Grafton	William	

If the last names are the same, consider the second indexing unit.

NAME	1	2	3
FrankM artin	Martin	Frank	
George Martin	Martin	George	
George C. Martin	Martin	George	C.

If the last names are the same but vary in spelling, consider each letter.

NAME	1	2	3
JoyRea d	Read	Joy	
Janice Reed	Reed	Janice	
Phyllis J. Reid	Reid	Phyllis	J.

Initials are considered the same as a whole word and are filed before names beginning with the same initial. Names with no initial are filed before those with an initial (i.e., nothing before something).

NAME	1	2	3
ArthurSt one	Stone	Arthur	
C.St one	Stone	C.	
Charles Stone	Stone	Charles	

If two people have the same name, they are indexed according to the alphabetical order of the city of residence, then by state. If two people have the same name and live in the same city, they are indexed according to street name.

NAME	1	2	3
RichardM urphey(Gr and Rapids)	Murphey	Richard	Grand Rapids
Richard Murphey (Grandville)	Murphey	Richard	Grandville

Surname prefixes are considered part of the last name, not separate words. A hyphenated surname (e.g., Meyer-Schafer) is considered a single indexing unit. A compound personal name that is not hyphenated (e.g., Catherine Myers Schafer) is treated as separate indexing units.

NAME	1	2	3
ConnieM acDonald	MacDonald	Connie	
Connie McDonald	McDonald	Connie	
Alice Meyer-Schafer	Meyer-Schafer	Alice	
Martin O'Connor	O'Connor	Martin	
Frank M. O'Dell	O'Dell	Frank	M.
Catherine Myers Schafer	Schafer	Catherine	Myers

If the first word in a compound surname is one of the standard prefixes (e.g., St. in St. James), the surname is indexed as a single unit.

NAME	1	2	3
Edward St. James	Saint James	Edward	
William St. Johns	Saint Johns	William	
James E. Sutton	Sutton	James	E.

(Continued)

BOX 8-2 Indexing Rules for the Alphabetical System—cont'd

Titles and degrees are disregarded but may be placed in parentheses after the names.

NAME	1	2	3
Professor Joseph C. Kline	Kline	Joseph	C. (Prof.)
Father Patrick O'Reilly	O'Reilly	Patrick (Fr.)	
Capt. C. J. Walters	Walters	C.	J. (Capt.)

A seniority designation is not considered an indexing unit but is used as an identifying element to distinguish between identical names.

NAME	1	2	3
Charles D. Flynn Jr.	Flynn	Charles	D. (Junior)
Charles D. Flynn Sr.	Flynn	Charles	D. (Senior)

Titles used without a complete name should be considered as the key indexing unit.

NAME	1	2	3
Father Patrick	Father	Patrick	
Sister Mary Martha	Sister	Mary	Martha

Articles, conjunctions, and prepositions are disregarded in indexing.

NAME	1	2	3
The Litton Massage Clinic	Litton	Massage	Clinic (The)

A firm or business name is indexed in the order written unless it contains an individual's name.

NAME	1	2	3	4	5
The Harvey F. Andrews Massage Practice	Andrews	Harvey	F.	Massage	Practice (The)
Grand Rapids Massage Practice	Grand	Rapids	Massage Practice		
Fritz Sports Massage	Fritz	Massage Practice			

Agencies of the federal government are indexed under United States Government and then according to department, division, subdivision, and location for adequate differentiation.

NAME	1	2	3	4	5	6
Federal Bureau of Investigation	United	States (Dept. of)	Govt. (Bur. of)	Justice	Federal	Investigation
Bureau of Labor	United	States (Dept. of)	Govt. (Bur. of)	Labor	Labor	Statistics

State, county, and city governments are indexed according to location and then by department, division, or subdivision.

NAME	1	2	3
Park Department, Kent	Kent	County	Park (Dept.) County
Michigan State	Michigan	State	Education (Dept. of) Department of Education
Grandville Department	Grandville	City	Health (Dept.) of Health

Numbers spelled as words in business names are filed alphabetically. Numbers written in digit form are filed before letters or words.

NAME	1	2	3	4
5-Cent Copy Center	5	Cent	Copy	Center
Four Seasons Health Spa	Four	Seasons	Health	Spa
Seventh Street Photo Center	Seventh	Street	Photo	Center

Names of schools are first indexed by the name of the city in which the school is located and then by the name of the school.

Local banking or other institutions with branch offices are indexed as the name is written. However, if banks from several cities are involved, the first indexing unit is the city where the bank is located, and the name of the bank follows.

Numbers, including Roman numerals, are filed before alphabetical information. However, all Arabic numerals come before Roman numerals.

Acronyms, abbreviations, and television and radio call letters are treated as one unit, and company names are filed as you see them. Hyphenated last names are indexed by the second last name.

in the front of the file folder. This system can also be used for treatment records in a client's clinical chart. The most current treatment data sheet appears first, followed by past treatment records.

Another type of chronologic classification system is a *tickler file*, or follow-up file. The most common type of tickler file contains the days of the month and the months of the year. The captions on a tickler file are most commonly the days of the month, from 1 to 31. Items to be completed are filed in the slot of the day you plan to complete the task. Take time each day to review the tickler file. Perform the task to be done on that day, or move the notation to the appropriate day if the activity has been rescheduled. Care should be taken to ensure that an activity is not placed on a weekend day or holiday on which you may not be able to complete the task. The files for these days should be carefully checked in advance to ensure that the task is done before the weekend or holiday or that the task is placed in the slot of a later day.

ELECTRONIC FILES

Storage of electronic records requires a knowledge of computer systems and the storage of word processing, database, or spreadsheet files, as well as knowledge of tasks that require you to sort, search, retrieve, and print reports. In a massage practice, you probably will most often use a manual filing system, but you may also use at least one type of electronic storage system. Special attention must be paid to the storage of electronic storage systems to prevent damage and loss of data. Each manufacturer may recommend specific care for its products, but in general, they should be protected from dust, magnetic fields, extreme temperatures, liquids, and vapors. Box 8-3 presents several suggestions for ensuring safe storage of data.

STORAGE EQUIPMENT

After an appropriate filing system has been chosen, the massage therapist must determine what types of supplies and equipment are necessary to maintain the system. The equipment should be practical for day-to-day use and for storage.

The term *filing equipment* refers to the structures that store files or records. Most manufacturers supply a variety of models in different colors with assorted features. Many practices still use vertical file cabinets, but open-shelf and lateral file cabinets have become very popular, especially if space is limited. A *vertical file* cabinet stores records in drawers; file folders are placed on the folder's edge and arranged according to the filing method selected. Vertical file cabinets are available with one to five or more drawers and may accommodate an 8.5 by 11 inch (letter size) or 8.5 by 14 inch (legal

BOX 8-3 Diskette Care

- Never touch the internal disk; handle disks only by the protective outer cover.
- Do not expose disks to magnetic fields, such as those produced by telephones, radio speakers, or computer screens.
- Keep disks at temperatures of 50 to 140°F (10 to 60°C); avoid extreme temperatures.
- Protect disks from dust and foreign particles.
- Do not expose disks to water or other liquids.
- If disks contain permanent information, use the *write protect* system to prevent data loss. Write protect is a feature on a disk or tape that prevents writing over existing data.

From Finkbeiner BL, Finkbeiner CA: *Practice Management for the Dental Team*, ed 6, St. Louis, 2006, Mosby.

size) file. These are not the best file cabinets to use for saving space. You must allow room for the cabinet and for the pull-out drawer space. This means you need approximately double the space of the vertical cabinet.

A *lateral file* (Fig. 8-2) cabinet is similar to a vertical file cabinet, except that the longest side opens, and the files are stored as if they were placed on a bookshelf. Lateral file cabinets have the added advantage of providing a countertop for reviewing files removed from the cabinet or for displaying books and other materials. Like their vertical counterparts, lateral file cabinets are designed to accommodate letter- or legal-size files. These cabinets can store more files and require less floor and pull-out drawer space.

Open-shelf filing saves space and speeds filing and retrieval. The visibility and accessibility of open-shelf filing have proved to be two of the many advantages of this arrangement (Fig. 8-3). Compared with a closed drawer filing system, open-shelf units hold twice as many files on one half of the floor space. The files give a visible sense of location and allow the users to take full advantage of index guides and color-coding techniques. Misfiled information becomes less of a problem. However, because the files are open, dirt and dust may accumulate if covers are not used.

A *card file* can be used to store small cards (i.e., 3 by 5 inch, 4 by 6 inch, or larger) that are used for specialized systems. Such a system can also be used for a recall system. A card with the client's name, telephone numbers, and other pertinent information may be set up in a metal or wooden box and used as a quick reference. Another example of the card system that allows for quick reference to clients' names, addresses, telephone numbers, and special notations about the family is the rotary or Rolodex file (Fig. 8-4). A second rotary file can be useful for addresses, e-mail addresses, and telephone numbers related to business activities such as maintenance and suppliers.

When selecting filing equipment, you should consider a fire-protection file. As a precaution against fire destruction,



FIGURE 8-2. Lateral file cabinet. (Courtesy of Steelcase, Grand Rapids, MI.)



FIGURE 8-3. Open-shelf filing system. (Courtesy of Kardex Systems, Marietta, OH. In Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

the clients' ledger cards, the appointment book, disk copies, and other vital records should be placed in the file at the end of each workday.

STORAGE SUPPLIES

Filing supplies for paper storage include file guides, file folders, folder labels (in a variety of colors for color-coding), cross-reference sheets, and out-guides.

File guides, usually heavy cardboard, divide the file drawer into separate sections. The division is indicated by a tab that extends above the guide. The guides divide the alphabet into sections, or they may show a division in a numeric sequence. The file drawer is marked on the outside to correspond with the division of the filing arrangement.

File folders are usually made of manila paper or another heavy type of material. Folders may be obtained in a variety of cuts. Using a variety of cuts allows the tabs to be arranged



FIGURE 8-4. Rolodex file. (From Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

in a staggered fashion. The tabs may be on the far-left side, or they may be center cut, one-third cut, or one-fifth cut.

Most massage practices prefer to use client file folders or envelopes with labels that come in a variety of colors. This type of file and label guards against misplaced records and provides space for the client's name, address, and telephone number. Most file folders can be labeled with gummed labels, available in a variety of styles (i.e., rolls of labels, peel-off labels, and continuous folded strips) and colors that make the folders easier to locate and refile (Fig. 8-5). In a group practice, a different color may be used to designate the clients of each massage therapist or other practitioner.

Several points should be remembered when making the labels. The labels should be keyed, not handwritten; keying should begin two or three spaces from the left edge of the label and at a uniform distance (usually one line space) from the top edge of the label; the name may be keyed in all capital letters, or the first letter of each important word may be capitalized; and the established format should be followed consistently.

Color-coding of file folders aids in fast retrieval and refiling. Figure 8-6 shows a typical open-shelf, end-tab filing system that uses colored filing labels on each file folder to translate the alphabetical rules discussed earlier into a color code. The assignment of color to each alphabetical character has long been recognized by efficiency experts as a time and energy saver. When clients' charts are filed alphabetically and when each letter in the alphabet has a different file label color, color block patterns begin to form



FIGURE 8-5. Labelk itwi tha ssortedla bels. (Courtesy of SYCOM, Madison, WI. In Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)



FIGURE 8-6. Filing labels are used on the client's file folder. (From Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

in the open-shelf system—block patterns that immediately direct the eye toward the proper filing areas. This virtually eliminates the misfiling common in non-color-coded systems.

Sometimes, cross-referencing is necessary within the filing system. Cross-referencing helps locate or file the information in its proper location. For example, if a letter is to be filed by the business name rather than by the name of the individual who has written the letter, you may look under the individual's name and find the cross-reference sheet that directs you to the name of the business (Fig. 8-7).

The electronic supplies necessary for records management include specially designed storage units for disks or tapes. These may be small plastic or fabric units that hold one to five disks, plastic or wooden desktop boxes, rotary

CROSS-REFERENCE SHEET	
NAME/SUBJECT	FILE NO.
REGARDING	DATE
see	
NAME/SUBJECT	FILE NO.

FIGURE 8-7. Cross-reference sheet. (From Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

files, or ring binders with vinyl pages that have pockets. Similar boxes are available for compact disks. A tape backup system is necessary when large amounts of data stored on hard disks must be recorded. Some of these systems store the entire contents of a hard disk on a single minicassette.

MANAGING WORKSTATION RECORDS EFFECTIVELY

Regardless of the types of records or systems used, organization of the workstation is an absolute necessity for successful records management. Almost all massage therapists spend some of their workday filing records of some type. Even if your filing duties are limited to organizing your own files, you need to develop and follow a simple system. The goal should be to establish a system that allows for easy retrieval. Successful retrieval means you will be able to find a record or document when needed in a minimal amount of time. This type of efficiency eliminates time and motion and ultimately financial loss. Box 8-4 presents tips for successful records management.

SUMMARY

Massage therapists must prepare records for filing, set up filing systems, and maintain current and archived records. There are different types of filing systems, and an important business management function is selecting the appropriate filing system to best serve the business. The business office is becoming paperless, and knowledge of electronic

BOX 8-4 Tips for Successful Records Management**PAPER RECORDS**

1. Organize incoming and outgoing papers in an In/Out box. Use a stackable style that has two or three trays. Label each tray In, Out, or Hold. The Hold tray is for papers that do not have to be acted on immediately.
2. Used esk drawer files for personal records, forms, stationery, procedural handbooks, and other routinely used items.
3. Use logbooks to record recurring events or data, such as long distance telephone calls, petty cash, and appointment call lists.
4. Keep correspondence in a loose-leaf binder called a *correspondence* or *chronological file*, and date each folder for the year. This provides a fingertip reference of all correspondence pertaining to any client or given activity.
5. Plan a work schedule that includes filing as a daily routine.
6. When placing records in a folder, remove the folder from the file far enough so that the material can be placed completely in the folder and does not extend over the top edge of the folder or tab.
7. Bec areful to place materials *in* a folder, not behind or in front of another folder.
8. Do not use paper clips on filed material. It is easy for other materials to attach themselves to the clips. Staples are better if materials must be held together, but remove the first staple before adding another.
9. Toa voidfi ling errors, designate as few people as possible to file and retrieve records.
10. When searching for lost records, check transposition and alternate spellings of names.
11. Replacef olders as they become wornout .
12. Avoidov eruse of the *Miscellaneousfi* le.

ELECTRONIC RECORDS

1. Store disks in a file box specifically designed for the disk style.
2. Label each disk with a general classification.
3. Print an index of the documents on disk each time a new document is added. The index can be folded and placed in the jacket or kept in a reference notebook.
4. When a disk becomes full and you want to use the same label for a new disk, number the disks in consecutive order (e.g., “Letters 1,” “Letters 2”). Mark each new disk with the date it was first used.
5. Store documents in electronic folders named to represent the activity (e.g., “Correspondence,” “Recall,” “Client charts”).

From Finkbeiner BL, Finkbeiner CA: *Practice Management for the Dental Team*, ed 6, St. Louis, 2006, Mosby.

**Good Stuff from the Government**

All of the links for this chapter are on the Evolve Web site.

INTERNAL REVENUE SERVICE: RECORDKEEPING (<http://www.irs.gov>)

Why should I keep records? Good records will help you to monitor the progress of your business, prepare your financial statements, identify source of receipts, keep track of deductible expenses, prepare your tax returns, and support items reported on tax returns (<http://www.irs.gov/businesses/>).

What kinds of records should I keep? You may choose any recordkeeping system suited to your business that clearly shows your income and expenses. Except in a few cases, the law does not require any special kind of records. However, the business you are in affects the type of records you need to keep for federal tax purposes (<http://www.irs.gov/businesses/>).

How long should I keep records? The length of time you should keep a document depends on the action, expense, or event the document records. You must keep your records as long as they may be needed to prove the income or deductions on a tax return (<http://www.irs.gov/businesses/>).

How long should I keep employment tax records? You must keep all of your records as long as they may be needed; however, keep all records of employment taxes for at least 4 years (<http://www.irs.gov/businesses/>).

How should I record my business transactions? Purchases, sales, payroll, and other transactions you have in your business generate supporting documents. These documents contain information you need to record in your books (<http://www.irs.gov/businesses/>).

What is the burden of proof? The responsibility to prove entries, deductions, and statements made on your tax returns is known as the burden of proof. You must be able to prove (substantiate) certain elements of expenses to deduct them (<http://www.irs.gov/businesses/>).

RELATED TOPICS

Publication 583, Starting a Business and Keeping Records (<http://www.irs.gov/publications/p583/index.html>).

Online Classroom, Lesson 1: What you need to know about federal taxes and your new business (<http://www.irs.gov/businesses/small/article/0,,id=97726,00.html>).

Business with Employees (<http://www.irs.gov/businesses/>).

Operating a Business (<http://www.irs.gov/businesses/>).

files processes and procedures and of storage equipment is important. The various types of storage equipment and supplies must be considered. The way in which records and procedures are maintained provides a platform for organization of the business. As always, there are good things from the government to add to or expand the information in this chapter.

Bibliography

Fulton PJ: *General office procedures for colleges*, ed 12, Cincinnati, OH, 2003, South-Western.

Mosley DC et al: *Supervisory management*, ed 6, Cincinnati, OH, 2004, South-Western.

Evolve Annotated Web Links

<http://evolve.elsevier.com/Fritz/business>

Internal Revenue Service: <http://www.irs.gov/publications/p583/ar02.html#d0e2170>

Workbook

- List four steps for preparing materials to be filed.

- Define the five basic methods of filing.

- Describe the following filing equipment:

- Vertical file

- Open-shelf file

- Card file

- Rolodex™ file

- Tickler file

- Electronic file

- Explain how color-coding is used in the message office files.

- List five helpful hints for more efficient filing.

6. Assume that the following list of names with addresses represents the accounts payable for the massage practice.
- Index each name by keying them in proper indexing form.
 - Using a manual system, arrange the cards in alphabetical order, and prepare a list of alphabetical names.

Apex Business Supplies
1816 S. Riverfront
Elgin, IL 26582

T.S. Davis
2605 S. State
Chicago, IL 26528

Quality Massage Supplies
P.O. Box D-1
Minneapolis, MN 48807

J.P. T. Uniforms
22803 T hird Avenue
Benton Harbor, MI 23062

Davis & Davis Office Supplies
4800 N. Baseline
Grand Rapids, MI 27501

M & M Creative Systems
11015 Orange Avenue
Los Angeles, CA 90025

Tasha D. Apple
3668 N. W. Territorial
Buffalo, NY 32506

Quick Copy
1108 T hird Street
Des Moines, IA 42106

QT Physical Therapy Supplies
1556 E ighth Street SW
Dubuque, IA 42013

Roberta S. Davis, C. P.A.
90724 S. Hubbard
Gary, IN 30682

Mark C. Sylvester
2601 Beck Boulevard
Albany, NY 30582

Telcom Credit Bureau
914 E. Michigan
Madison, WI 78034

C.V. Talbot
2247 Hamilton
Charleston, WV 82506

Batch & Associates
839 Frederick
Hampton, VA 26809

B B Waste Paper Co.
1308 Candler
Charlotte, NC 89045

Brian Baumgartner
6262 Shield
Jamestown, ND 45902

Consumer Counseling
590 Bridge Street
Charleston, SC 78032

E.S. Comstock
1255 Harbour Cove
Los Altos, CA 91256

Community Coop
2236 Stadium Drive
Kansas City, MO 64119

Krauss & Krauss Accounting
152 Banker Boulevard
Kansas City, KS 78566

WRITTEN COMMUNICATION

OUTLINE

Letters

Thank You for Referral Letter
Letter of Appreciation
Birthday Letter and Holiday Greetings
Congratulatory Letter
Referral
Sympathy Message
Miscellaneous Letters

Newsletters as Marketing Devices

Selecting Stationery Supplies

Characteristics of an Effective Letter

Parts of a Business Letter
Punctuation Styles in Business Letters

Preparing an Effective Letter

Collecting Information
Making an Outline
Developing the Letter
Selecting the Format

Reviewing the Letter

Producing the Final Letter

Proofreading the Letter

Distributing the Letter

Storing the Document

Preparing the Envelope

Folding and Inserting the Letter

Electronic Mail

Use of E-mail

E-mail Ethics and Etiquette

Other Types of Written Communication

Post Cards

Interoffice Memoranda

Manuscripts

Managing Business Mail

Processing Outgoing Mail

Processing Incoming Mail

Summary

KEY TERMS

Attention line

Body

Complimentary close

Date line

Electronic mail (e-mail)

Interoffice memorandum

Keyboarded signature

Mixed punctuation

Open punctuation

Reference initials

Salutation

Subject line

LEARNING OUTCOMES

Mastery of the content in this chapter will enable the reader to:

- Describe the various types of written communication in a message office
- Select stationery supplies
- Identify the characteristics of effective correspondence
- Identify the parts of a letter
- Review rules of punctuation and capitalization
- Describe the basic steps for preparing written communication
- Apply various formatting styles to written communication
- Describe standard procedures for preparing outgoing mail

ⓔ Guidelines for the Learning Activities and answers to the Workbook questions are located on Evolve at <http://evolve.elsevier.com/Fritz/business>.

LEARNING OUTCOMES—Cont'd

- Observe ethical and legal obligations in written communication
- Explain the use of e-mail in the massage office
- Apply common business etiquette to the use of e-mail
- Identify the classifications of mail
- Identify special mail services
- Explain the function of a postage meter
- Explain the procedure for sorting incoming mail

You will be surprised how often you will communicate in written form in the business setting. This chapter may seem to be a reminder of high school English. We thought the information we had to learn in high school was useless, but as adults, we need to be reminded of how to complete a task, such as writing a business letter.

Good business and professional writing should sound like a person talking to another person. Unfortunately, some of the writing produced in our professional lives does not seem to be written by caring people. Using an easy-to-read style makes the reader respond more positively to your ideas. You can make your writing easier to read in two ways. First, you can make individual sentences and paragraphs easy to read so the reader can easily skim the first paragraph or read the entire document in as short a time as possible. Second, you can make the document visually pleasant and structured.

Good business and professional writing is closer to a conversation and less formal than the style of writing that has traditionally earned high marks on college essays and term papers. Most people have several styles of talking that they vary instinctively depending on the audience; the same is true of your writing in the massage practice. A letter to a massage therapist regarding a professional technique or a letter to a massage supplier demanding better service may be formal, whereas an e-mail to a colleague probably is informal and perhaps even chatty.

In Chapter 7, we examined the various types of documents generated in the massage office. It is time to review other types of written communication in a massage practice, specifically the use of letters, forms, and newsletters. These documents are created for a variety of reasons. This chapter discusses the creation and production of written communication and how it is distributed and describes how incoming communication in manually written and electronic forms are processed.

LETTERS

Many types of written documents are generated in the massage office, but none is as important as the letters that seek to enhance public relations with clients and professional colleagues. These letters should be original and create a professional image. The letter should be one that you are proud to mail from the office.

With the increased use of word processing in the massage office, the dreaded task of creating an original letter each time

one is needed can be eliminated. You can have a supply of sample letters stored as templates in an electronic file. When necessary, you can transform the sample into an original letter that is professional and that can be personalized within minutes.

The types of written communication most commonly sent from a massage office include thank you notes for referral of clients, letters of appreciation, birthday or holiday greetings, congratulatory letters, sympathy messages, client transfer letters or letters of consultation, collection letters, order letters, and newsletters.

Thank You for Referral Letter

The massage therapist should be appreciative of the confidence expressed by a client who refers a new client to the office and should acknowledge such a referral with a personally signed letter. Although this letter should mention the name of the referred client, it should not divulge any confidential information about the treatment. An example of this type of thank you letter is shown in Figure 9-1. You will note that the content varies according to the situation.

Letter of Appreciation

A massage therapist should acknowledge a client who is prompt for appointments, maintains a regular payment plan, and cooperates with suggested self-plans. This is an opportunity to give sincere compliments. When the opportunity presents itself, try writing a letter as in Figure 9-2 and see how appreciative your clients are. A letter of appreciation should be sincere, state the purpose briefly, and be written as though you were conversing with the client in person.

Birthday Letter and Holiday Greetings

People, especially children and older adults, like to be recognized on their birthdays. These letters should be cheerful. Figure 9-3 shows a letter that could be sent to an older adult on a special birthday. Another method of handling this form of public relations is to send a birthday card (Fig. 9-4).

Congratulatory Letter

Through conversations with clients and by reading the daily newspaper, you can learn about the outstanding achievements of clients. These accomplishments should not go

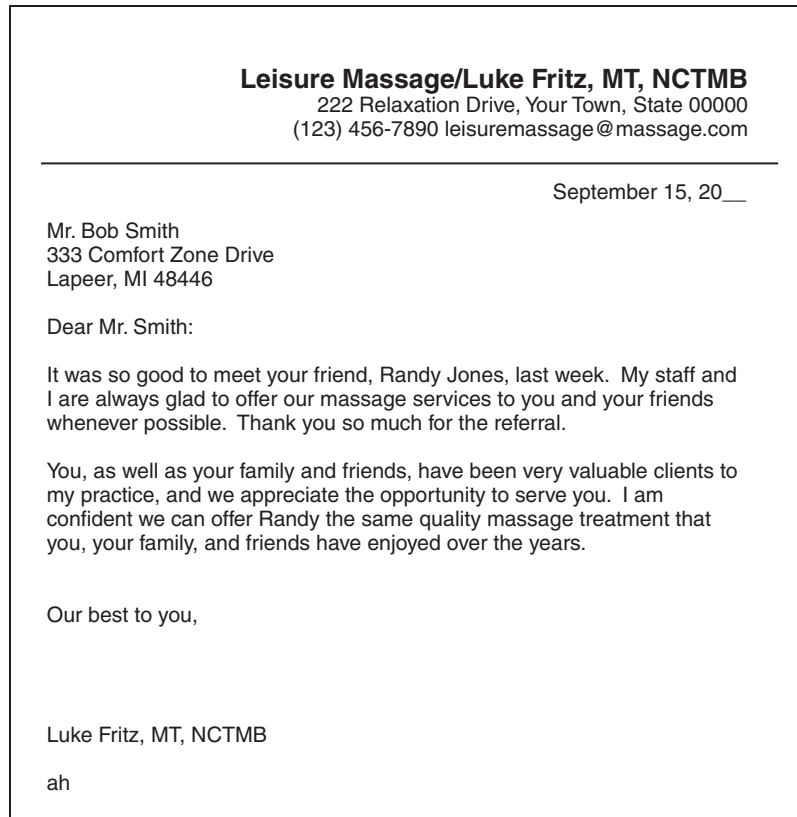


FIGURE 9-1. Letter thanking a client for a referral. ☹ This letter template is posted on Evolve at <http://evolve.elsevier.com/Fritz/business>.

unnoticed by the massage office staff. A letter sent to congratulate a client must be sent promptly. Include how you learned of the event and a sincere expression of congratulations (Fig. 9-5). Congratulations can also be sent for the birth of a child, a wedding, or a graduation. A greeting card or brief letter is appropriate.

Referral

When appropriate, the massage therapist can refer the client to other professionals. A different massage therapist may better serve the client, another form of bodywork may be indicated, or the client's condition may need to be evaluated by a physician. Alternatively, someone may refer a client to you. When this is the case, written communication as an aspect of the referral and thank you letters to those who have referred to you are advisable (Fig. 9-6).

Sympathy Message

Many people find it difficult to express sympathy in a letter. One of the best ways to handle this difficult situation is to send a sympathy card. It is the unexpected message that often means a great deal to family members in their time of grief.

Miscellaneous Letters

Many letters are not public relations letters and are not included in this chapter. Specific examples of recall, broken appointment, and collection letters are discussed in the chapters that specifically address each of these topics (Fig. 9-7).



LEARNING ACTIVITY

Choose one of the letter types discussed in this chapter, and write a fictitious letter that meets the recommendations.

NEWSLETTERS AS MARKETING DEVICES

As massage therapists seek to address the consumer market, marketing becomes part of the business of massage therapy. If done ethically and with concern for the values of the community and the education of the public, marketing can be a valuable tool.

Automated systems in the massage office have made it easier to incorporate marketing procedures into the massage business. One of the products of automated systems is a client newsletter. A newsletter can educate your clients about

Leisure Massage/Luke Fritz, MT, NCTMB
222 Relaxation Drive, Your Town, State 00000
(123) 456-7890 leisuremassage@massage.com

September 15, 20__

Mr. Bob Jones
333 Comfort Zone Drive
Lapeer, MI 48446

Dear Mr. Jones:

Our philosophy at Leisure Massage includes a partnership in well-being with each client. I wanted to take an opportunity to thank you for being a good partner in your care. My staff and I are grateful for the courtesy that you show us regarding your appointments, prompt payment of your account, and your diligence on your self-help plan.

We always look forward to your appointments and feel you bring a positive attitude when calling on our office. We hope you continue to enjoy the investment you are putting into your life. We promise to continue providing our very best massage services and any assistance you need to help you benefit the most from your massage.

Thank you again for your continued loyalty.

Sincerely,

Luke Fritz, MT, NCTMB

ah

FIGURE 9-2. Letter of appreciation to a cooperative client. © This letter template is posted on Evolve at <http://evolve.elsevier.com/Fritz/business>.

Leisure Massage/Luke Fritz, MT, NCTMB
222 Relaxation Drive, Your Town, State 00000
(123) 456-7890 leisuremassage@massage.com

September 15, 20__

Mr. Bob Smith
333 Comfort Zone Drive
Lapeer, MI 48446

Dear Mr. Smith:

Happy birthday! My staff and I wish to send you our very best wishes for a wonderful day. We hope you will enjoy your special day and take time out to reflect on your accomplishments over the past year.

Birthdays are a time for celebration and a renewed dedication to your goodness and health. We hope your day finds you marking the event with loved ones.

Again, best wishes on your birthday and continued health in the future. We look forward to seeing you in 2 weeks.

Sincerely,

Luke Fritz, MT, NCTMB

ah

FIGURE 9-3. Letter acknowledging the birthday of an older adult. © This letter template is posted on Evolve at <http://evolve.elsevier.com/Fritz/business>.



FIGURE 9-4. Birthdaypost cards. (Modified from Colwell, Division of Patterson Companies, Champaign, IL.)

new ideas and research in massage therapy, basic massage related health concepts, community trends, and ideas your business is promoting, such as a Mother’s Day special.

Newsletters may be a single page or many pages (Fig. 9-8) and should be mailed regularly—quarterly or biannually.

Software packages can be used to generate the original copy, which then can be duplicated at a discount printer. Others have the entire newsletter generated and produced outside the office.

Newsletters can be sent by e-mail. If this is your choice for correspondence including newsletters, it will be necessary to collect e-mail addresses during the intake process. Regardless of the method of production, it is important that the content originate from the massage therapist and the staff, with their own philosophy and image influencing the final product.

SELECTING STATIONERY SUPPLIES

If you begin working in an established massage practice, stationery supplies will be available. However, in a new business, you must choose business supplies as part of the start-up process. Many of these supplies are described in Chapter 6.

The business stationery (letterhead) is usually selected on the basis of simplicity, neatness, and quality. Bond paper, because of its quality, is often used. It can be made from all-cotton fiber (sometimes called rag), from all sulfite (a wood pulp), or from any proportion of the two. High-cotton fiber bond indicates quality and prestige, and it ages without deterioration or chemical breakdown.

The following information may be used as a guide for future stationery needs:

- Letterhead for standard office use: business size 8.5 by 11 inches, usually 16- or 20-pound bond, 25% cotton fiber(r ag)
- Letterhead for executive use: standard and Monarch size (7.25 by 10 inches), usually 24-pound bond, 100% cotton fiber
- Matching envelopes for standard office use: no. 10 (4.125 by 9.5 inches), same weight and fiber content as letterhead
- Matching envelopes for executive use: no. 10 and no. 7 (3.875 by 7.5 inches), same weight and fiber content as letterhead

A color theme may be used for stationery items, such as letterheads, envelopes, appointment cards, and notepads. Color coordinates such as light and dark mauve or blue or contrasting tones of gray with black print are attractive combinations. Most stationery supply houses have samples of stationery stock and logo designs from which you may select.

A popular alternative to purchasing stationery is to create the letterhead using appropriate computer software. A fine bond paper can be purchased. When a new letter is to be keyboarded, the letterhead is removed from the file where it is stored, the letter is prepared, and it is printed on bond paper. This method is less expensive and allows for more frequent changes and creativity. Clip art makes it easy to create

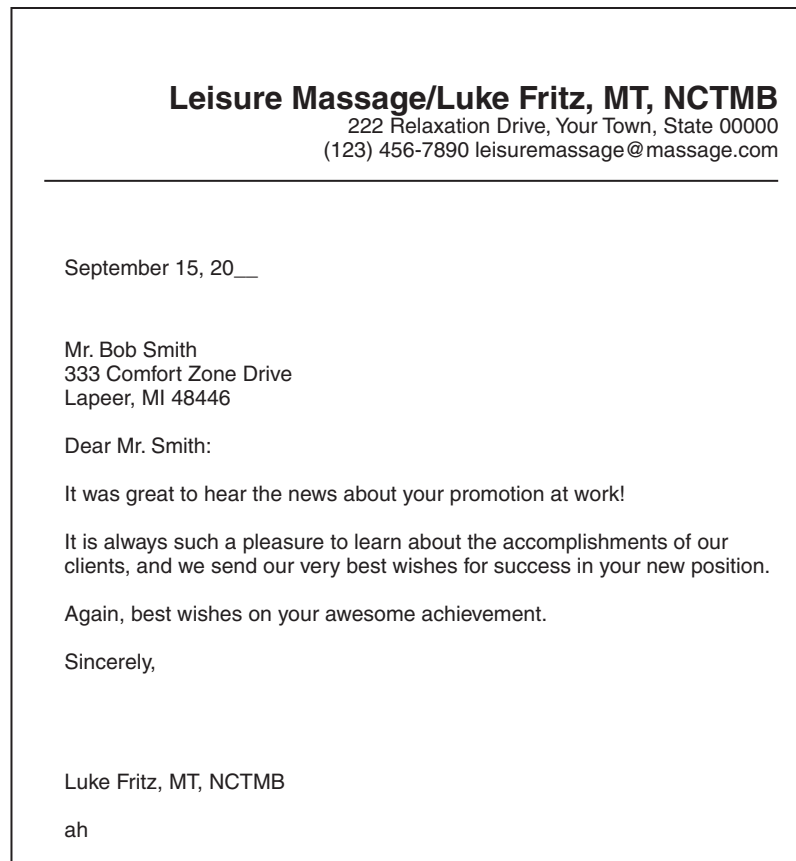


FIGURE 9-5. Congratulatory letter. © This letter template is posted on Evolve at <http://evolve.elsevier.com/Fritz/business>.

a professional letterhead that provides you many options. Labels with the same clip art and office information can also be created in this manner. The labels that are selected must be compatible with the office printer.

CHARACTERISTICS OF AN EFFECTIVE LETTER

Effective letters (including e-mails) that generate good public relations have certain common elements. Direct, simple writing is easier to read. The best word depends on the context, including the situation, the purpose, the audience, and the words you have already used. Use words that are accurate, appropriate, and familiar. Accurate words mean what you want to say. Appropriate words convey the attitudes you want to create and fit well with the other words in your document. Familiar words are easy to read and understand.

Use technical terminology sparingly. The exception to this rule is communication with another professional, when you need to describe a condition or treatment in technical terms. However, when communicating with clients or laypersons, it is wise to use a plain English equivalent instead of a technical term.

Use active verbs most of the time. This is common in writing for a job application or referring a client. If the verb

describes something that the subject is doing, the verb is active. If the verb describes something that is being done to the grammatical subject, the verb is passive:

Active: I recommend that the client's knee be assessed for joint damage.

Passive: It was recommended by me for the client to have his knee assessed for joint damage.

Tighten your writing. Eliminate words that say nothing, and combine sentences to eliminate unnecessary words. Put the meaning of the sentence into the subject and verb. Cut words if the idea is already clear from other words in the sentence. Substitute single words for wordy phrases.

Wordy: Keep this information in the client's file for future reference.

Tighter: Keep this information for reference.

Tighter: File this information.

Phrases beginning with *of*, *which*, and *that* can often be shortened:

Wordy: The issue of most importance

Tighter: The most important issue

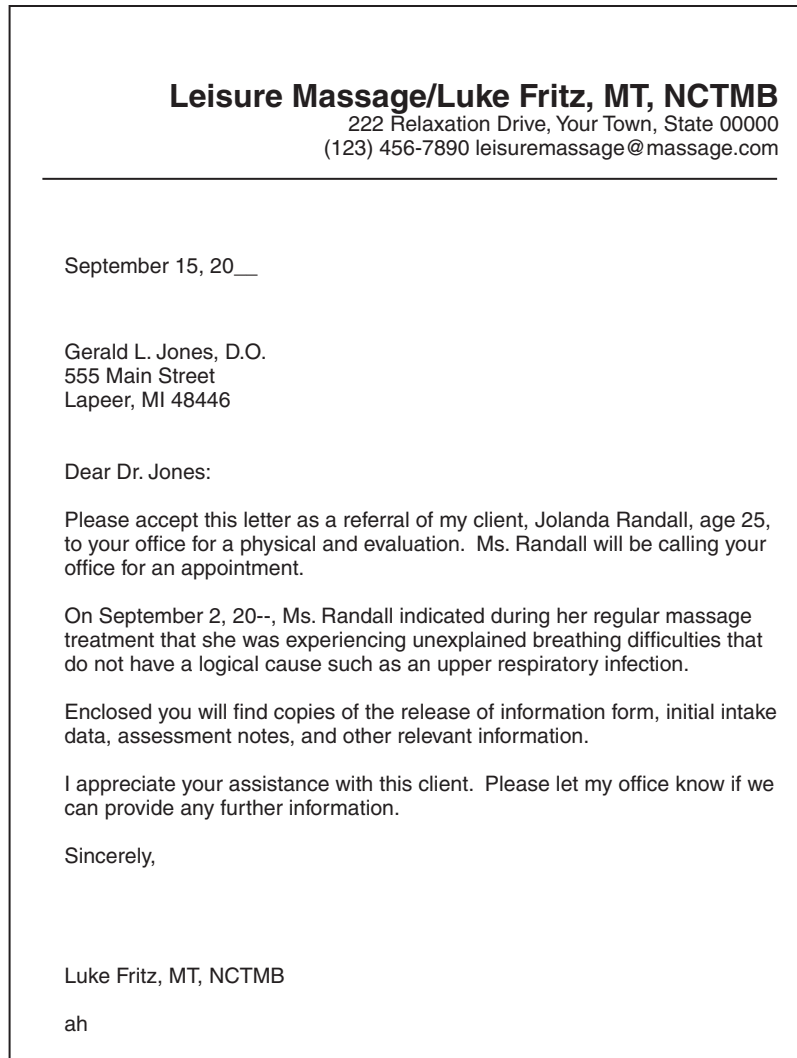


FIGURE 9-6. Referral of a client to a chiropractor. © This letter template is posted on Evolve at <http://evolve.elsevier.com/Fritz/business>.

Wordy: It is the case that certified massage therapists are more qualified to practice in our office.

Tighter: Certified massage therapists are more qualified for in our office.

Combine sentences to eliminate unnecessary words. In addition to saving words, combining sentences focuses the reader's attention on key points, makes your writing sound more sophisticated, and sharpens the relationship between ideas, making your writing more coherent.

Wordy: I conducted a survey by telephone on Monday April 17th. I questioned 18 massage practitioners, some massage technicians without certification, and some certified massage therapists, who according to the state directory were all currently working. The purpose of this survey was to find out how many of them were working in health care. I also wanted to

find out if there were any differences between their salaries.

Tighter: On Monday, April 17th, I phoned certified and noncertified working massage professionals to determine (1) if they were working in health care and (2) whether there was a distinction between salaries for these two credentials.

Vary sentence length and sentence structure. A readable letter mixes sentence lengths and varies sentence structure. A short sentence is less than 10 words and can add punch to your letter. Long sentences of 30 to 40 words can raise a danger flag.

A simple sentence has one main clause:

We will open a new officet hism onth.

A compound sentence has two main clauses joined with *and*, *but*, *or*, or another conjunction. Compound sentences are

Leisure Massage/Luke Fritz, MT, NCTMB
222 Relaxation Drive, Your Town, State 00000
(123) 456-7890 leisuremassage@massage.com

<<Today's date in words>>

<<Client's name>>
<<Client's street address>>
<<Client's city, state zip code>>

Dear <<Client's name>>:

Welcome to Leisure Massage! Our staff looks forward to meeting you on <<appointment date>> at <<appointment time>>. It is always our goal to ensure that the time you spend with us is pleasant and worthwhile.

Please bring with you the completed client information sheet (enclosed), as well as any applicable insurance forms if your health insurance covers massage therapy.

During your first visit we will complete an assessment and customize a treatment plan that meets your specific needs. If you have any questions, please don't hesitate to contact our office.

Looking forward to meeting you,

Luke Fritz, MT, NCTMB

ah

FIGURE 9-7. Form letter from a massage therapist to welcome a new client. © This letter template is posted on Evolve at <http://evolve.elsevier.com/Fritz/business>.

used best when the ideas in the two clauses are closely related:

We have hired three new massage therapists, and they will complete their orientation next week.

We hired a new massage therapist, but he will be unable to begin work until the end of the month.

Complex sentences have one main and one subordinate clause. They are good for showing logical relationships:

When the new office opens, we will have an open house for potential clients and offer refreshments and door prizes. Because we already have a strong client base in Livingston County, we expect the new office will be as successful as the Ann Arbor office.

Use parallel structure. Parallel structure puts words, phrases, or clauses in the same grammatical and logical

form. Clarity eliminates long, meaningless words and uses language that the reader will understand. You can be certain each statement will not be misinterpreted:

Nonparallel: The position is prestigious, challenging, and also offers good money.

Parallel: The position offers prestige, challenge, and money.

Nonparallel: The steps in the planning process include the following: determining the objectives, an idea of who the reader is, and a list of the facts.

Parallel: Determine the objective, consider the reader, and gather the facts.

Put your readers in your sentences. Use second person pronouns (you) rather than third person (he, she, one) or first person (I, we) to give your writing a greater team approach. The "you" approach to letter writing requires the

Getting the most out of your massage

Volume 1, Issue 2

Newsletter Date

Special points of interest:

- Nutrition
- Water
- Rest
- Sleep Schedule
- Disease
- Essential Oils
- Memory

Sandy Fritz

204 Nepeensing

Lapeer, MI 48446

123-456-7890

Diet, Water, Rest

This probably isn't the first time you've heard this. Drink more water, eat a nutritious diet, get enough sleep. Well, you're going to hear it again. Why, because I believe everyone out there is trying to live a perfect life. Let's be honest with ourselves. Really think about the answer to this scenario: To live the perfect life probably means feeling a whole lot better than you are feeling at the present moment. Do you have an ailment, little or big? It could be as little as getting a cold sore or as big as diabetes or high blood pressure. So let's help ourselves by taking a small step and giving up just one bad food in our diet—whether it is a food with high fructose corn syrup, a drink such as “pop” or “soda.” Or cut out the French fries when going out to eat and replace with a vegetable or salad. It's not as hard as you think. What it takes is perseverance and the desire to live a better life than you did yesterday. Adjusting your pure clean water intake, if you don't

drink enough already, would help tremendously. The amount needed is still in debate, but the general rule is your body weight divided in half equals the amount of water in ounces you should drink a day. For some that's true, but others need to drink more. For instance, my assistant had some substantial tests done; she doesn't hold her water so she needs to drink a liter of water a day, and she is a tiny person. Remember—after a massage you need to drink more than usual because the massage is getting things moving so toxins are probably wanting to come out. So drink your water to let those toxins out. Last but not least—Rest. If you are tired during the day, you're probably overworked. So get to bed before 10 pm and if that isn't doable then try 11 pm and after awhile try 10:30 pm and so on. This is to let your circadian rhythm do its job. The melatonin in your body depends on darkness and 12 hours to



work its magic. Again, let it do its job. If you want more research on it, go on the internet and search for the importance of darkness while sleeping. For those who work nights, get some really good black-out shades and hopefully that'll do the trick. All this will help you get the best results from your massage.

Essential Oils

One of the passions that I have developed after becoming a massage therapist is making essential oils. Yes, I actually make my own. Sure, I buy them too, but making your very own is very rewarding. Essential oils is really a secret that many don't know about even though they have been used for a long time. Essential oils have been used

throughout history for healing purposes. I use them for the same reason and also for relaxation. They can also bring about a calming effect. For instance, have you ever walked into someone's house and thought, “I know that smell; it reminds me of my mom or grandma”? Many smells trigger those memories we had as a

child or even as adults. Smell and memory are closely linked because the olfactory bulb is part of the brain's limbic system. If this intrigues you, go into a natural food store and ask for some essential oils—you'll be amazed at what memories they may trigger.

FIGURE 9-8. Newsletter from a massage office to a client. © This newsletter template is posted on Evolve at <http://evolve.elsevier.com/Fritz/business>.

writer to place the reader at the center of the message. When writing the letter, put yourself in place of the reader.

Third person: Referrals for clients in this office are made by our office manager, and the client will be contacted as soon as the appointment has been confirmed with the specialist.

Second person: After you are referred to a specialist, you will receive a confirmation of your appointment from our office manager.

In addition to the ideas previously discussed, you should review the basic characteristics of effective correspondence. These factors should be used in a review of the letter before it is sent. Remember that the letter sent from the massage office is representative of the quality of work or treatment produced in that practice. Reading the correspondence out loud can help detect areas that are unclear or that may read in a clumsy manner.

Review your letter for the following:

Completeness: Include all of the data the reader needs to make a decision or take action.

Conciseness: Be brief.

Confidentiality: Release information only about the case that is relative to the contents of the letter and only after the client has given consent to release specific information.

Courtesy: Use good manners for good public relations. Do not make derogatory statements.

Accuracy: All of the data must be correct. Check details carefully, and use correct spelling and grammar.

Neatness: Avoid smudges, tears, or wrinkles.

Attitude: Use positive words that indicate you are helpful and caring (Box 9-1).

Orientation: Use second person style when writing the letter. Pronouns should be “you oriented.”

Parts of a Business Letter

A review of the parts of a business letter and the proper placement and purpose for each part is appropriate before you select a letter style or begin to create the letter. Most business letters contain the following parts:

- Date line
- Inside address (letter address)
- Salutation
- Body
- Complimentary close
- Keyboarded signature
- Reference initials
- Special notations, such as an attention line, a subject line, or enclosures

When using most word processing software, many preformatted letter styles are available. Dates are automatic,

BOX 9-1 Positive and Negative Words

POSITIVE WORDS

I will
 Congratulations
 Concern
 Pleasure
 Thank you
 Satisfactory
 I can
 Welcome

NEGATIVE WORDS

I'm sorry
 Complaint
 Difficult
 Unpleasant
 No
 Can't
 Careless
 Error
 Inconvenient
 Disappointed

and in most systems, alignment and letter parts are already defined.

DATE LINE

The *date line* contains the date the letter is keyboarded. When using printed letterhead stationery, the date usually begins a double line space below the lowest line of the letterhead. The letterhead usually takes up about 2 inches, but this depends on the style and design of the letterhead. Window envelopes require the date line to be placed on a line 2 inches below the top of the page.

The length of the letter often determines whether the heading should be started lower on the paper; use good judgment. When keyboarding a personal business letter, the individual's return address is placed as the first two lines directly above the date line. The position of the date line can be affected by the length of the letter. When using the computer, you may go to Print Preview to check the appearance of the letter, and necessary changes can be made before printing. General guidelines that relate to letter length are shown in Table 9-1.

INSIDE ADDRESS

The inside address provides all of the information for mailing the letter. The letter address should match the envelope address. When using word processing, the envelope often is addressed from the letter address by a minor key function on the computer. The address information includes the recipient's name, the name of company (if appropriate), street number and name, city, state, and zip code. Three lines of space are left between the date and the first line of the letter address.

TABLE 9-1 Placement of a Date Line

LETTER LENGTH	SIDE MARGINS	TOP AND BOTTOM MARGINS
Short (less than 100 words)	2 inches	3 inches
Average (101 to 200 words)	1.5 inches	2 inches
Long (201 to 300 words)	1 inch	1 inch

Use titles preceding the individual's name (Mr., Mrs., Ms., or Dr.). Do not use a double title, such as Dr. L. B. Bildice Ph.D.; this is redundant. An official title, such as President, may follow the name, such as Ms. M. P. Coleman, President. The person's official title is often placed on the second line if it helps to balance the inside address lines. The city, state, and zip code are placed on the last line. The appropriate two-letter state abbreviation should be set in capital letters without a period. Leave two spaces after the abbreviation before entering the zip code.

SALUTATION

The *salutation* formally greets the reader. If the writer wishes the letter to be directed to an individual within a firm, it is acceptable to use an attention line. The salutation line should begin one double line space below the letter address and should be even with the left margin. If you are writing to an individual, the most appropriate salutation is the individual's name. For example, if the letter is addressed to Mr. Ted Monroe, the salutation is "Dear Mr. Monroe." The salutation can be altered to "Dear Ted" if you are a close friend of the recipient. This change in formality should be recognized before keyboarding the letter. Special situations occur when the letter is to be sent to unknown individuals or to more than one person. Suggestions for salutations to be used in common situations are shown in Box 9-2, as are addresses and salutations used for governmental and academic officials.

BODY OF THE LETTER

The *body* of the letter contains the message. It begins a double line space after the salutation. The paragraphs within the body are single spaced with double spacing between paragraphs. Paragraphs may or may not be indented, depending on the format selected (see Figs. 9-1 to 9-3 and 9-10). Many illustrations in this chapter demonstrate variations in format styles.

COMPLIMENTARY CLOSE

The *complimentary close* provides a courteous ending to the letter. It is keyboarded a double space after the last line of the body of the letter. The complimentary close is entered at the same point as the date line position if using the modified block style or aligned with the left margin if using the block

style. Only the first word of the complimentary close should be capitalized. The most common complimentary closes are "Very truly yours" and "Sincerely." Other acceptable closes are "Yours very truly" and "Sincerely yours."

KEYBOARDED SIGNATURE

The *keyboarded signature* appears four line spaces below the complimentary close. If the name and title of the individual are short, they may be placed on the same line and separated by a comma. If the name and title are relatively long, the name is keyboarded on the first line, and the title is placed on the second line. The comma is not placed after the name. You should attempt to make the lines as even as possible.

REFERENCE INITIALS

If someone else has typed the letter for you, *reference initials* are the initials of the person who keyboards the letter. They should appear in lowercase one double line space after the keyboarded signature, even with the left margin.

ATTENTION LINE

You may wish to direct a letter to a particular individual or department within an organization. This can be done by using an attention line. The following example illustrates how an attention line is used if the letter has been addressed to a firm:

ApexM assageSuppl ies
 Attention Ms. W. W. Thomas, President
 1616W .Ri verfrontSt reet
 AnyT own,A nySt ate00000- 0000

The *attention line* indicates that the letter writer prefers that the letter be directed to a particular individual. The salutation should agree with the inside address, not the attention line.

SUBJECT LINE

The *subject line* clearly states what the letter is about. For example, if writing to a client regarding the office policy on broken appointments, the subject line is written as follows—Subject: Missed Appointments. The subject line is entered a double line space after the salutation and is followed by a double line space before continuing with the body of the letter. The subject line may be centered, begun at paragraph point, or aligned with the left margin when using block style. The style of letter often determines the best position for the subject line. The word subject or abbreviation RE may be entered in all capital letters or in capitals and lowercase, or it may be underlined. Acceptable methods using the subject line are illustrated as follows:

DearM rs.Ca lloway:
 SUBJECT:M issedA ppointments
 or

BOX 9-2 Salutations**APPROPRIATE SALUTATIONS FOR VARIOUS SITUATIONS**

One person, sex unknown: Dear M.R. Rieger
 One person, name unknown, title known: Dear Director of Surgical Technology
 One woman, title unknown: Dear Ms. Hartwig
 Two or more women, titles known: Dear Ms. Martin, Mrs. Leverett, and Ms. Grey
 If all women are married: Dear Mrs. Franks, Mrs. Johnson, and Mrs. Sullens, or Dear Mesdames Franks, Johnson, and Sullens
 If all women are unmarried: Dear Miss Franks, Miss Johnson, and Miss Sullens, or Dear Misses Franks, Johnson, and Sullens
 If all recipients are women: Dear Ms. Franks, Johnson, and Sullens, or Dear Meses. or Mses. Franks, Johnson, and Sullens
 A woman and a man: Dear Ms. Johnson and Mr. Ladley
 A group or organization composed entirely of women: Ladies or Mesdames
 A group or organization composed entirely of men: Gentlemen
 A group composed of women and men: Ladies and Gentlemen

ADDRESSES AND SALUTATIONS FOR GOVERNMENT AND ACADEMIC OFFICIALS

The following addresses and salutations are recommended in correspondence with governmental or academic officials. In each case, the proper ways to address letters are illustrated. On the left are addresses, and on the right are salutations. When additional examples are given, they are arranged in order of decreasing formality.

Correspondence with Government Officials**The President**

The President Sir, Madam
 The White House Mr. (Mrs. or Ms.) President
 Washington, DC 20500 Dear Mr. (Mrs. or Ms.) President

or

The President of the United States

The White House
 Washington, DC 20500

Chief Justice of the Supreme Court

The Chief Justice of the United States Sir, Madam
 Washington, DC 20543 Mr. or Madam Chief Justice

or

The Honorable (full name)
 United States Supreme Court
 Washington, DC 20543

Associate Justice of the Supreme Court

The Honorable (full name) Sir, Madam
 Associate Justice of the Supreme Court Mr. or Madam Justice
 Washington, My dear Justice Dear Justice (surname)
 DC 20543 (surname)

Cabinet member

The Honorable (full name) Sir, Madam
 Secretary of State Dear Sir, Madam
 Washington, DC 20520 My dear Mr. or Madam Secretary

or

Dear Mr. or Madam Secretary

The Secretary of State
 Washington, DC 20520

Senator

The Honorable (full name) Sir, Madam
 The United States Senate Dear Sir, Madam
 Washington, DC 20510 My dear Mr. or Madam Senator
or
 My dear Senator (surname) Senator (full name)
 Dear Senator (surname)

The United States Senate
 Washington, DC 20510

Representative

The Honorable (full name) Sir, Madam
 The House of Representatives Dear Sir, Madam
 Washington, DC 20515 My dear Representative
 (surname)

or

Dear Representative (surname)
 Representative (full name)
 The House of Representatives
 Washington, DC 20515

Chief, Director, or Commissioner of a Government Bureau

Mr., Ms., Mrs., or Miss (full name) Sir, Madam
 Director of Public Information Dear Sir, Madam
 Department of Justice My dear Mr., Ms., Mrs.,
 Washington, DC 20530 or Miss (surname)
 Dear Mr., Ms., Mrs., or Miss

or

Director of Public Information
 Department of Justice
 Washington, DC 20530

Governor

The Honorable (full name) Sir, Madam
 Governor of Ohio Dear Sir, Madam
 Columbus, OH 43215 My dear Governor (surname)

or

Dear Governor (surname) The Governor of Ohio
 Dear Governor

Columbus, OH 43215

State Senator

The Honorable (full name) Sir, Madam
 The State Senate Dear Sir, Madam
 Columbus, OH 43215 My dear Senator

or

My dear Senator (surname)
 Senator (full name) Dear Senator (surname)
 The State Senate My dear Mr., Ms., Mrs., or Miss
 Columbus, OH 43215 (surname)
 Dear Mr., Ms., Mrs., or Miss

State Representative

The Honorable (full name) Sir, Madam
 House of Representatives Dear Sir, Madam
 Columbus, OH 43215 My dear Representative
 (surname)

or

BOX 9-2 Salutations—cont'd

Dear Representative (surname)
 Representative (full name) My dear Mr., Ms., Mrs., or Miss
 (surname)

House of Representatives Dear Mr., Ms., Mrs., or Miss
 Columbus, OH 43215 (surname)

Mayor of a city

The Honorable (full name) Sir, Madam
 Mayor of the City of Ann Arbor My dear Sir or Madam
 City Hall Dear Sir or Madam
 Ann Arbor, MI 48105 Dear Mr. or Madam Mayor
 My dear Mayor (surname)
 Dear Mayor (surname)

Correspondence with Educators**President (college or university)**

Dr. (full name) My dear Sir, Madam
 or
 Dear Sir, Madam
 (full name), Ph.D. My dear President (surname)
 President Dear President (surname)
 Ohio University
 Athens, OH 45701

Dean of a college

Dean (full name) My dear Sir, Madam
 College of Business Administration Dear Sir, Madam
 University of Cincinnati My dear Dean (surname)
 Cincinnati, OH 45221 Dear Dean (surname)

or

Dr. (full name)
 Dean of the College of Business Administration
 University of Cincinnati
 Cincinnati, OH 45221
 (If the individual has a doctorate degree, the salutation may be
 Dear Dr. Wilson instead of Dear Dean Wilson.)

Professor (college or university)

(full name), Ph.D. My dear Sir, Madam
 Dr. (full name) Dear Sir, Madam
 Vanderbilt University My dear Professor (surname)
 Nashville, TN 37203 Dear Dr. (surname)
 Dear Mrs. Mr. Ms., or Miss (surname)

Dear Mrs. Calloway:
 RE: Missed APPOINTMENTS
 or

Dear Mrs. Calloway:
 RE: Missed appointments

ENCLOSURES

Papers, pictures, or other materials sometimes are enclosed with the letter. When the letter mentions that an item is enclosed or attached, an enclosure notation should be made. This notation is keyboarded a double line space below the reference initials or in that area if reference initials are not used, even with the left margin. Two acceptable methods are as follows:

Enclosure
 or
 Enclosures2

COPY NOTATION

When additional copies of the letter are made for distribution to various persons, reference to each recipient is commonly made in the copy notation. This informs the recipient to whom copies were sent. Several types of notations are possible, including mail, copy, blind copy, postscript, and second-page headings.

Special Mailing Notations

Notations such as REGISTERED MAIL, SPECIAL DELIVERY, or CERTIFIED are keyboarded in all capital letters between the date and inside address, and they are aligned

with the left margin. Other special notations, such as CONFIDENTIAL or PERSONAL, are entered in the same location.

Types of Copy Notations

With the use of word processing software, copies of correspondence are stored electronically; however, paper copies of all business correspondence should be available in the office. When additional copies are made for distribution, it is necessary for the addressee to know this. A notation is keyboarded a double line space below the enclosure, if used, or below the reference initials if there is no enclosure. When more than one person is to receive a copy, list each person on a succeeding line, indenting three spaces from the left margin. Because not all copies are photocopies or computer copies, variations may be used as they apply to the various copy styles. The notation may be keyboarded as follows:

Copy to O. J. Fox
 or
 cc O. J. Fox (copy)
 or
 cc O. J. Fox (courtesy copy)
 or
 cc O. J. Fox (courtesy copies to multiple parties)
 R. C. Campbell
 M. A. Reynolds

Blind Copy

If the person who receives the original letter does not need to know that a copy is being sent to a particular person, a blind copy notation can be made. To do this, the original copy is removed from the computer or machine, and the

Very truly yours,

Jana Larke, MT, NCTMB

ah

PS. Thank you so much for suggesting a lighting dimmer for the massage room. The dimmer lets me adjust the lighting as needed and also provide a relaxing ambiance for our clients.

FIGURE 9-9. Example of a postscript.

notation is keyboarded on the copy 1 inch from the top at the left margin, as in the following example:

bcBa rbaraRi ce

Postscript

A postscript is often used to highlight a particular point. It is not necessarily an item that has been omitted in the body of the letter. If a postscript is used, it is the last line entered. It is not necessary to precede the postscript with P.S.; however, the postscript paragraph should be blocked or indented, depending on the style of letter used (Fig. 9-9).

Second-Page Heading

When writing a client referral letter, it is sometimes necessary to send a lengthy letter to provide adequate information about the client. If a second page is necessary, the continuation is made on plain paper that is the same size, color, and quality as the letterhead. Leave a 1-inch bottom margin on the first page. Include at least two lines of a paragraph at the bottom of the first page, and continue with at least two lines of the same paragraph on the succeeding page. A heading consisting of the addressee, page number, and date is single spaced, 1 inch (line six) from the top of the sheet. The following are two acceptable arrangements for beginning the second page. Block form is used when the letter is in block style:

Ms.M argaretT hompson
Page2
October27, 0000

Horizontal form is used when the letter is in modified block style:

Ms. Margaret Thompson 2 October 27, 0000
(triple space)

Punctuation Styles In Business Letters

Two common styles of punctuation are used in business letters: open punctuation and mixed or standard punctuation. *Open punctuation* omits all punctuation (except periods

after abbreviations) in the salutation and complimentary close lines. *Mixed* or *standard punctuation* requires a colon after the salutation and a comma after the complimentary close. Either style of punctuation may be used with any of the basic letter styles.

If you use titles and academic degrees in writing, the traditional rule is to never omit the period after the element of an academic degree or religious order and never include internal spaces: B.S., Ph.D., or Ed.D. This rule may need to be altered, however, in contemporary use when addressing envelopes or completing specialized federal, state, or insurance forms that limit space for computerization or scanning. Addressing envelopes is discussed in greater detail later in this chapter.

Correct punctuation is based on certain accepted rules and principles rather than on the whim of the writer. Punctuation enables the reader to correctly interpret the writer's thoughts. The summary of rules given in this chapter will be helpful in using correct punctuation. The common use of periods, commas, colons, and other types of punctuation is illustrated in Boxes 9-3 to 9-13.

CAPITALIZATION

In addition to understanding the rules for punctuation, it is necessary to review the rules for capitalizing various initials and words. A summary of the rules for capitalization is convenient for reference purposes and is listed in Box 9-14.

TELEPHONE NUMBERS

There are several ways of entering telephone numbers in a letter. The parentheses method—(734) 956-9800—is frequently used, but it does not work well in text material when the telephone number as a whole has to be enclosed in parentheses. Parentheses are also avoided because of the growing use of the mandatory area code where there is a shortage of numbers. In these areas, the use of the parentheses with the telephone number may suggest you would not need to use the area code. Three other methods of entering telephone numbers are 707-555-3998, 707 555 3998, and 707.555.3998. The latter system, which uses periods to separate the elements, seems to be gaining popularity. The periods resemble the dots in e-mail addresses.

BOX 9-3 The Period

1. The period indicates a full stop and is used at the end of a complete declarative or imperative sentence.
2. It is also used after an abbreviation and after a single or double initial that represents a word (does not apply to addressing envelopes).
acct. etc. Ph.D.
U.S. viz. p.m.
N.E. i.e. pp.
3. Some abbreviations that are made up of several initial letters do not require periods.
FDIC (Federal Deposit Insurance Corporation)
AMA (American Massage Association)
AAA (American Automobile Association)
YWCA (Young Women's Christian Association)
4. Insert a period between dollars and cents (period and cipher are not required when an amount in even dollars is expressed in numerals).
\$42.65 \$1.47 \$25
5. Insert a period to indicate a decimal.
3.5 bushels 12.65% 6.25 feet

BOX 9-4 The Comma

The comma indicates a partial stop and is used in the following instances:

1. To separate coordinate clauses that are connected by conjunctions, such as *and*, *but*, *or*, *for*, *neither*, or *nor*, unless the clauses are short and closely connected:
We have a supply on hand, but I think we should order an additional quantity.
She had to work late, because the auditors were examining the books.
2. To set off a subordinate clause that precedes the main clause:
Assuming that there will be no changes, I suggest that you proceed with your instructions.
3. After an introductory phrase containing a verb form:
Tofinish his work, he remained at the office after hours.
After planning the program, she proceeded to put it into effect.
4. Introductory phrases are set off by commas to make sentences easier to read and to avoid confusion:
After much deliberation the plan was revoked. Because of the vacation period we have been extremely busy.
5. To set off a nonrestrictive clause:
Our group, which had never lost a debate, won the grand prize.
6. To set off a nonrestrictive phrase:
The beacon, rising proudly toward the sky, guided the pilots safely home.
7. To separate from the rest of the sentence a word or a group of words that breaks the continuity of a sentence:
The business manager, even though his work was completed, was always willing to help others.
8. To separate parenthetical expressions from the rest of the sentence.
We have, as you know, two persons who can handle the reorganization.
9. To set off names used in direct address or to set off explanatory phrases or clauses:
I think you, Mr. Bennett, will agree with the statement.
Ms. Linda Tom, our vice-president, will be in your city soon.
10. To separate from the rest of the sentence expressions that may be interpreted incorrectly without punctuation:
Misleading: Ever since we have filed our reports monthly.
Better: Ever since, we have filed our reports monthly.
11. To separate words or groups of words when they are used in a series of three or more:
Most executives agree that dependability, trustworthiness, ambition, and judgment are required of their office workers.
I emphasize that factory organization, correlation of sales and production, and good office organization are all necessary for maximum results.
12. To set off short quotations from the rest of the sentence:
He said, "I shall be there."
"The committees have agreed," he said, "to work together on the project."
13. To separate the name of a city from the name of a state:
Our southern branch is located in Atlanta, Georgia.
14. To separate abbreviations of titles from the name:
William R. Warner, Jr.
Ramona Sanchez, Ph.D.

BOX 9-5 The Semicolon

The semicolon is used in the following instances:

1. Between independent groups or clauses that are long or that contain parts that are separated by commas:
He was outstanding in his knowledge of word processing, databases, spreadsheets, and related software applications; however, he was lacking in many desirable personal qualities.
2. Between the members of a compound sentence when the conjunction is omitted:
Many executives would rather dictate to a machine than to a secretary; the machine will not talk back.
3. In a series of well-defined units when special emphasis is desired:
Emphatic: The prudent secretary considers the future; he or she ensures that all requirements are obtained, and he or she uses his or her talents to attain the desired goal successfully.
Less emphatic: The prudent secretary considers the future, ensures that all requirements are obtained, and uses his or her talents to attain his desired goal successfully.

BOX 9-6 The Colon

The colon is used in the following instances:

1. After the salutation in a business letter, except when open punctuation is used:
Ladies and Gentlemen:
Dear Mr. Carroll:
2. After introductory expressions, such as *the following*, *as follows*, and other expressions that precede enumerations:
Please send the following by parcel post:
Officers were elected as follows: president, vice-president, and secretary-treasurer.
3. To separate hours and minutes when indicating time:
2:10 PM 4:45 PM 12:15 AM
4. To introduce a long quotation:
The agreement read: "We the undersigned hereby agree ..."
5. To separate two independent groups having no connecting words between them and in which the second group explains or expands the statement in the first group:
We selected the machine for one reason: in competitive tests, it surpassed all other machines.
There are several reasons for changing the routine of handling mail: to reduce postage, to conserve time, and to place responsibility.

BOX 9-7 The Question Mark

The question mark (interrogation point) is used in the following instances:

1. After a direct question:
When do you expect to arrive in Philadelphia?
2. An exception to the foregoing rule is a sentence that is phrased in the form of a question as a matter of courtesy, although it is a request:
Will you please send us an up-to-date statement of our account.
3. After each question in a series of questions within one sentence:
What is your opinion of the IBM word processor? The Xerox? The CPT?

BOX 9-8 The Exclamation Point

The exclamation point is used ordinarily after words or groups of words that express a command, a strong feeling, an emotion, or an exclamation:

Don't waste office supplies!
It can't be done!
Stop!

BOX 9-9 The Dash

The dash is used in the following instances:

- To indicate an omission of letters or figures:
Dear Mr.— Datet he letter July 16, 20—
- Sometimes a dash is used in letters, especially sales letters, to cause a definite stop in reading the letter. The dash typically is used in such cases for increased emphasis, but be careful not to overuse the dash:
This book is not a revision of an old book—it is a brand new book.
- To separate parenthetical-type expressions when unusual emphasis is desired on the parenthetical expression:
These sales arguments—and every one of them is important—should result in getting the order.

BOX 9-10 The Apostrophe

The apostrophe should be used in the following instances:

- To indicate possession:
the client's record
the assaget herapist's coat
the assistants' responsibilities
the assaget herapists' records.
- To form the possessive singular, add 's to the noun:
man's work
bird's wing
hostess's plans
- An exception to this rule is made when the word following the possessive begins with an s sound:
forgoedness's sake
for conscience's sake
- To form the possessive of a plural noun ending in an s or z sound, add only the apostrophe to the plural noun:
workers' rights
hostesses' duties
- If the plural noun does not end in an s or z sound, add 's to the plural noun:
women's clothes
alumni's donations
- Proper names that end in an s sound form the possessive singular by adding 's:
Williams's house
Fox's automobile
- Proper names ending in s form the possessive plural by adding the apostrophe only:
The Walters' property faces the Jones' swimming pool.
- To indicate the omission of a letter or letters in a contraction.
it's (it is)
you're (you are)
we'll (we shall)
- To indicate the plurals of letters, figures, words, and abbreviations.
Don't forget to dot your i's and cross your t's.
I can add easily by 2's and 4's, but I have difficulty with 6's and 8's.
More direct letters can be written by using shorter sentences and by omitting and's and but's.
Two of the speakers were Ph.D.'s.

BOX 9-11 Quotation Marks

The following rules should be followed when using quotation marks:

- When a quotation mark is used with a comma or a period, the comma or period should be placed inside the quotation mark:
She said, "I plan to complete my program in college before seeking a position."
- When a quotation mark is used with a semicolon or a colon, the semicolon or colon should be placed outside the quotation mark.
The treasurer said, "I plan to go by train"; others in the group stated that they would go by plane.
- When more than one paragraph of quoted material is used, quotation marks should appear at the beginning of each paragraph and at the end of the last paragraph.

“ _____

_____.”

Quotation marks are used in the following instances:

- Before and after direct quotations:
The author states, "Too frequent use of certain words weakens the appeal."
- To indicate a quotation within a quotation, use single quotation marks:
The author states, "Too frequent use of 'very' and 'most' weakens the appeal."
- To indicate the title of a published article.
Have you read the article, "Automation in the Office?"
He asked, "Have you read 'Automation in the Office'?"

BOX 9-12 Omission Marks or Ellipses

Ellipses marks (... or ***) are frequently used to denote the omission of letters or words in quoted material. If the material omitted ends in a period, four omission marks are used (...). If the material omitted is elsewhere in the quoted material, three omission marks are used (...).

He quoted the proverb, "A soft answer turneth away wrath: but ..."

She quoted Plato, "Nothing is more unworthy of a wise man ... than to have allowed more time for trifling and useless things than theydeser ved."

From Fulton PJ: General Office Procedures for Colleges, ed 11, Cincinnati, OH, South-Western, 1998.

BOX 9-13 Parentheses

Although parentheses are frequently used as a catch-all in writing, they are correctly used in the following instances:

1. When amounts expressed in words are followed by figures:
He agreed to pay twenty-five dollars (\$25) as soon as possible.
2. Around words that are used as parenthetical expressions:
Our letter costs (excluding paper and postage) are much too high for this type of business.
3. To indicate technical references:
Sodium chloride (NaCl) is the chemical name for common table salt.
4. Where numerations are included in narrative form.
The reasons for his resignation were three: (1) advanced age, (2) failing health, and (3) a desire to travel.

BOX 9-14 Rules for Capitalization

Apply capitalization in the following instances:

1. The first word of every sentence should be capitalized.
2. The first word of a complete direct quotation should be capitalized.
3. The first word of a salutation and all nouns used in the salutation should be capitalized.
4. The first word in a complimentary close should be capitalized.
5. Capitalize the first word in each section of an outline form.
6. Capitalize the first word after a colon only when the colon introduces a complete passage or sentence having independent meaning.
In conclusion I wish to say: "The survey shows that ..."
7. If the material following a colon depends on the preceding clause, the first word after the colon is not capitalized:
I present the following three reasons for changing: the volume of business does not justify the expense; we are short of people; and the product is decreasing in popularity.

NAMES

1. Capitalize the names of associations, buildings, churches, hotels, streets, organizations, and clubs:
The American Massage Association, Merchandise Mart, Central District Massage Society, Peabody Hotel, Seventh Avenue, Administrative Management Society, Chicago Chamber of Commerce
2. Capitalize all proper names:
Great Britain, John G. Hammitt, Mexico
3. Capitalize names that are derived from proper names:
American, Chinese
4. Do not capitalize words that are derived from proper nouns and that have developed a special meaning:
pasteurized milk, chinadis
5. Capitalize special names for regions and localities:
North Central states, the Far East, the East Side, the Hoosier State
6. Do not capitalize adjectives derived from such names or localities that are used as directional parts of states and countries:
far eastern lands, the southern United States, southern Illinois
7. Capitalize names of government boards, agencies, bureaus, departments, and commissions:
Civil Service Commission, Social Security Board, Bureau of Navigation
8. Capitalize names of the deity (deities), the Bible, holy days, and religious denominations:
God, Easter, Yom Kippur, Genesis, Church of Christ

BOX 9-14 Rules for Capitalization—cont'd

9. Capitalize the names of holidays:
Memorial Day, Labor Day
10. Capitalize words used before numbers and numerals, with the exception of the common word, such as page, line, and verse:
The reservation is Lower 6, Car 27.
He found the material in Part 3 of Chapter X.

TITLES USED IN BUSINESS AND PROFESSIONS

1. Any title signifies rank, honor, and respect, and that immediately precedes an individual's name should be capitalized:
She asked President Harry G. Sanders to preside.
He was attended by Dr. Howard Richards.
2. Academic degrees should be capitalized when they precede or follow an individual name:
Constance R. Collins, Ph.D., was invited to direct the program.
Fred R. Bowling, Master of Arts
3. Capitalize titles of high-ranking government officers when the title is used in place of the proper name in referring to a specific person:
Our Senator invited us to visit him in Washington.
The President will return to Washington soon.
4. Capitalize military titles signifying rank:
Captain Myers, Lieutenant White, Lieutenant Commander Murphy

PREPARING AN EFFECTIVE LETTER

To prepare an effective letter, it is necessary to follow several basic steps:

1. Collect the information
2. Make an outline
3. Develop the letter
4. Select a format style
5. Review and revise the letter
6. Produce the letter
7. Proofread the letter
8. Distribute the letter
9. Store the document

Before beginning each step of letter writing, it is necessary to determine who will receive the letter and what the person knows about the subject you are writing. If a letter is to be written to another massage therapist or to a physician about a client, it will require using technical language. If a client is to receive a letter about an unknown subject, the educational level of the person needs to be determined so the letter can be written in understandable language.

Collecting Information

Before you begin to write the letter, you need to gather the important facts to be included in the letter. You should gather the following information: to whom the letter is being sent, by whom the letter is being written, and the subject of the letter. If it is a letter of referral, you will need the name of the client and any necessary personal information for which consent has been given, the nature of the problem or reason for referral, enclosures (if any), anticipated response, deadline dates, and how the client will make contact. If it is a

letter of inquiry, the nature of the inquiry, product names if available, quantity or specifications of the product or service, and date of needed reply are required.

Making an Outline

You may wonder why it is necessary to make an outline. After writing several letters, you may find that it is natural for you to be organized. If you are a beginner or someone who dislikes letter writing, making an outline can provide organization and a framework that forces you to get your thoughts on paper, and in the process, you may discover that you do not have all the facts you need. An outline helps you to see relationships between topics and determine if your letter is written in a logical sequence.

Developing the Letter

It is often said that after the outline is completed, you are nearly finished with the letter. This is partially true, but you do need to give special attention to how each part of the letter is developed and determine its format. A variety of format styles are illustrated in this chapter.

As you begin to develop the letter, remember that the first paragraph is the most important paragraph of any letter. It should get the reader's attention and set the tone for the letter. This paragraph places the emphasis on the reader and uses the second person approach. Review each paragraph in the letter to determine if it gets the reader's attention and clearly states the purpose of the letter. Make a natural transition from one paragraph to the next. Special consideration should be given to factors such as data and confidentiality that are included in various types of letters. Box 9-15 includes suggestions for writing several types of letters.

BOX 9-15 Special Considerations for Letter Content**ORDER LETTER**

- Indicate quantity.
- Provide a description of the material or product.
- List the price.
- Define the method of payment.
- Indicate your shipping preference.

REFERRAL LETTER

- Provide the complete and proper name of the client.
- State the condition and expected type of consultation or examination.
- Refer to enclosures.
- Indicate timeliness if necessary.
- Maintain confidentiality and provide only information for which consent is given.
- Extend your expression of appreciation.

INQUIRY LETTER

- State the objective.
- Give all the necessary facts.
- Close with goodwill.

THANK YOU LETTER

- State the purpose.
- Explain your appreciation.
- Maintain confidentiality.
- Close with a sincere expression of good will.

Selecting the Format

You may select a template from the word processing software in the office, but the letter still requires decisions about punctuation styles. Most word processing software provides several templates for a variety of letter styles, which can be modified to meet the massage therapist's preference and saved in the letter file as a specialized template. The block style with mixed punctuation is shown in Figure 9-10. Other styles include the block style with open punctuation, modified block style with mixed punctuation, block style with attention line and enclosure, and the Administrative Management Society (AMS) simplified style. The AMS simplified style can be put to good use when informing all clients about a policy change or announcing that an associate will be joining the practice. The style has two basic rules.

1. The letter must have a subject line. The word *subject* is omitted, and the subject line is keyboarded in all capital letters with a triple line space before and after the subject line.
2. The writer's name and title are keyboarded in all capital letters at least four lines below the last line of the letter.

Reviewing the Letter

After the letter has been written, you need to determine if the letter meets all of the criteria of an effective letter, as described in Box 9-15. If the letter does not meet most of

these criteria, take time to modify it. If you are unsure about a letter, ask another person to review and evaluate it. Make the necessary changes until all criteria are met.

Producing the Final Letter

Before the final printing of the letter, use spell-check and grammar-check functions, if available. Whether the letter is created on a typewriter or electronically using word processing software, the letter needs to be produced on quality stationery that creates a professional image of the office.

Proofreading the Letter

You cannot rely completely on an electronic system to proofread your letter. Although software packages provide spell-check programs, many massage terms are not in the dictionary, unless you have inserted them. Likewise, English words are often misused, such as *there* and *their*. Both of these words are read by the computer as correct, but you might have misused them. Not all word processing systems can be relied on for complete grammar accuracy. Make a final review of the letter to be certain the grammar, spelling, and punctuation are correct. Proofreading a letter is much like the final check of the margins on an amalgam restoration. It is your creation, and you want it to be perfect. Reading the letter out loud is a good strategy. The letter should sound smooth and be easy to read.

Distributing the Letter

There are several methods of distributing the letter: E-mail, traditional postal services, fax, or some form of specialized mail service. Each of these is explained in detail later in this chapter. Before creating the letter, you should be aware of the method of distribution to determine the type of envelope or mailing label necessary for production.

Storing the Document

If the letter is to be stored electronically, the procedure discussed in Chapter 8 should be followed. If not, a hard copy should be made and filed in the client record or other location that is appropriate for the document. If you are striving for the paperless office, you need to maximize the use of the electronic filing system.

Preparing the Envelope

It is possible to prepare the envelope as part of the word processing procedure, or the envelope may be keyboarded on a typewriter. Larger mailing envelopes may require special labeling. In either case, it is necessary to prepare the envelope or package with a standardized delivery address. Most postal services use automatic sorting equipment, which begins an

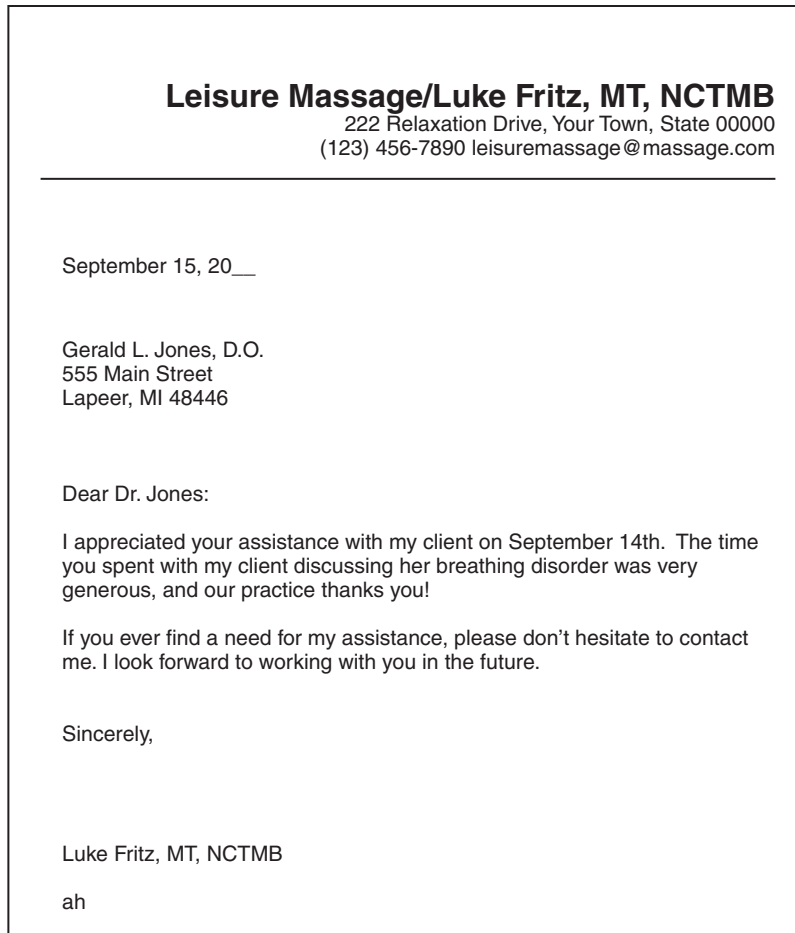


FIGURE 9-10. Block-style letter with mixed punctuation.

automatic sorting process with an optical character reader (OCR). A standardized address, readable by an OCR, contains the correct city name, state, and zip code. To obtain zip codes for any address, visit the U.S. Postal Service Web site at www.usps.com, and select the zip code navigation bar. The address on the envelope should agree with the inside address of the letter, although the inside address may contain punctuation not recommended by the postal service for the envelope.

The address is should be single spaced, even if the address is only two lines. In this case, the name of the individual or firm is on the first line, and the city, state, and zip code are on the second line. The two-letter state abbreviations, approved and recommended by the U.S. Postal Service, should be used. These abbreviations appear in Box 9-16. For further information, request Publication 28, Postal Addressing Standards, from your local Postal Business Center or by calling the National Address Information Center in Memphis, Tennessee, at 800-238-3150. Figure 9-11 shows how an address should be keyboarded on various business envelopes.

Other important elements of the address are suffixes, directional designations, apartment or suite numbers, post office box numbers, and complete rural or highway contract route addresses with box numbers. All of these elements must be spelled correctly and clearly written. If the address is not electronically readable, the letter or package will be delayed for manual handling.

ADDRESS FORMAT

Using the universal format for addresses expedites the processing capability of automated equipment at the post office. The format requires that you use a uniform left margin. Type the address in uppercase letters as follows:

MSM ARYBA LL
3347M APLERD
ANYT OWN,M I00000- 0000

A secondary address unit, such as an apartment (APT) or suite (STE) number, should be printed as part of the address. Always use APT or STE rather than the pound sign (#).

BOX 9-16 Two-Letter Abbreviations for States			
Alabama	AL	Montana	MT
Alaska	AK	Nebraska	NE
Arizona	AZ	Nevada	NV
Arkansas	AR	New Hampshire	NH
California	CA	New Jersey	NJ
Colorado	CO	New Mexico	NM
Connecticut	CT	New York	NY
Delaware	DE	North Carolina	NC
District of Columbia	DC	North Dakota	ND
Florida	FL	Ohio	OH
Georgia	GA	Oklahoma	OK
Hawaii	HI	Oregon	OR
Idaho	ID	Pennsylvania	PA
Illinois	IL	Rhode Island	RI
Indiana	IN	South Carolina	SC
Iowa	IA	South Dakota	SD
Kansas	KS	Tennessee	TN
Kentucky	KY	Texas	TX
Louisiana	LA	Utah	UT
Maine	ME	Vermont	VT
Maryland	MD	Virginia	VA
Massachusetts	MA	Washington	WA
Michigan	MI	West Virginia	WV
Minnesota	MN	Wisconsin	WI
Mississippi	MS	Wyoming	WY
Missouri	MO		

Common designations are APT, BLDG FLOOR (FL), STE, UNIT, ROOM (RM), and DEPARTMENT (DEPT). Using this format, the address line may appear as follows:

1334 RIVE RSIDEA PT 201
or
 3745 KINSEY DR STE 301
or
 845 KELSAY BLVD BLDG 5
or
 1234 KE LLOGGPL RM 136

If your letter or package is sent to the attention of an individual, that information precedes the line of the name of the firm or building. The attention line varies from the traditional format that many people have used:

ATTN: M SM ARYCL INE
 ACMEM ASSAGECOM PANY
 134 FL ETCHER
 ANYTOWN, OH 00000- 0000

Avoid using dual addresses, even though you may have a box number and street address available. Place the delivery address on the line immediately above the city, state, and zip code (ZIP4).

Mr Fritz
 204 E NEPESSING ST
 LAPEER, MI 48446

MRS. MURIEL SNYDER
 324 WRIGHT CT
 INVERNESS, TX 75061-1234

Mr Fritz
 204 E NEPESSING ST
 LAPEER, MI 48446

DAVIS LABORATORY COMPANY
 ATTENTION MR T D DUNCAN
 1334 ELYRIA RD
 ROCKFORD, MI 49506-2345

Mr Fritz
 204 E NEPESSING ST
 LAPEER, MI 48446

MR. MARK LADLEY
 456 OAK DRIVE
 TRAVERSE CITY, MI 43567-1234

FIGURE 9-11. Address styles for different sizes of envelopes. Notice placement of attention line.

PUNCTUATION ON ADDRESS LABELS

The U.S. Postal Service prefers that you do not use punctuation, special characters, or multiple blanks in the address, with the exception of a hyphen in the ZIP4 code or a hyphen that appears in the primary number of the delivery address, such as 51-234 HANCOCK ST. Spell out city names completely. If an abbreviation must be used because of labeling or space constraints, use existing abbreviations first for suffix or directional words, as in these examples:

EAST MARKET becomes E MARKET
 JEFFERSON MOUNTAIN becomes JEFFERSON M T

The eight standard directional designations can be abbreviated by one or two characters, as in the following example:

255 N WASHINGTON ST
 or
 133 C HERRY DR

If the first word in a street name is a directional word and no other directional designation is to the left of it, abbreviate it, as in these examples:

NORTH CHERRY ST becomes N CHERRY ST
 or

LAKE DRIVE WEST becomes LAKE DRIVE W

When two directional words appear before the street name, the first one is abbreviated:

NORTH EAST SUGAR ST becomes N EAST SUGAR ST

Folding and Inserting the Letter

After all enclosures have been checked to be certain they correspond to the letter and that the items are correct, the letters must be signed, and you must be sure that the right letter gets in the right envelope (letters get in the wrong envelopes surprisingly often). The letter is placed in the envelope so that the date and inside address are visible on opening the letter. The reader should not be forced to turn the paper around to begin reading the letter. Figure 9-12 shows a step-by-step procedure for folding and inserting the letter in the proper size of envelope.

ELECTRONIC MAIL

Use of E-mail

With the wide use of computers today, *electronic mail* (e-mail) has opened the doors to sending mail between computers within networked locations. E-mail within a large clinic has

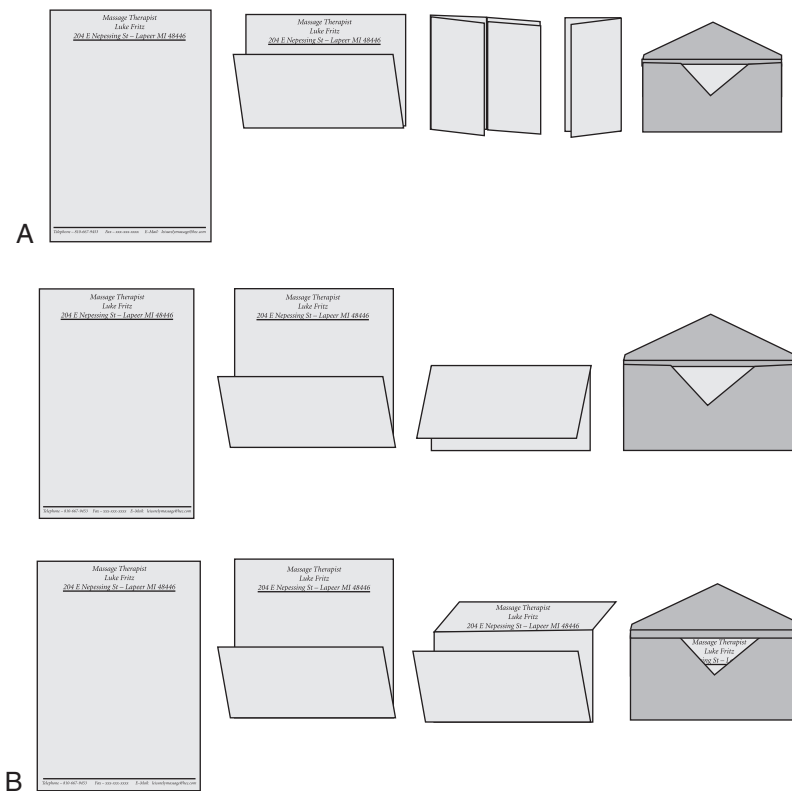


FIGURE 9-12. Folding and inserting a letter. **A**, Small envelope. **B**, Large envelope. (Modified from Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

become the choice for sending memoranda to the staff. With more clients having e-mail, this becomes another source of communication between the staff and clients. Consideration should be given to include this on the personal questionnaire on admission. The client's e-mail can be integrated into various software programs and may even be used to confirm appointments or act as a reminder for routine recalls. E-mail has many advantages as a communication tool:

- E-mail reaches its destination in a matter of seconds after it is sent, even if its destination is across the world.
- Multiple individuals may be sent the same message, with all the recipients receiving the message instantly.
- Paper is saved. It is not necessary to make a hard copy of e-mail.
- E-mail may be filed electronically for later reference.
- E-mail may be forwarded to another party.
- E-mail may be destroyed immediately after it is read.
- E-mail takes less time to write than a paper letter. Only the receiver's name, the sender's name, and the body of the letter need to be entered. The date and time is entered automatically, and the letter or envelope does not need to be printed.
- Other documents and graphic images may be transferred as attachments through e-mail.
- The recipient is notified of the arrival of an e-mail by a message that appears at the bottom of the computer screen or by an audio signal that is emitted through the computer.
- A hard copy of the e-mail may be printed if necessary for retention in a manual file.
- Notations such as "confidential" and "urgent" can be made on the e-mail message.

As with any new system, a person often overlooks the need to follow basic protocol. E-mail should not become a quick system for communication with no concern given to punctuation or formatting. Consider the following guidelines when using e-mail:

- Be certain you have thought about the purpose of the e-mail before you begin writing; know what you are trying to achieve with your e-mail message.
- Be succinct. Before you send your e-mail, reread it. Delete unnecessary phrases, words, or sentences.
- Be polite. Think of your e-mail as a short letter, and follow etiquette rules. Use *please* and *thank you*.
- Be suitably formal when writing e-mail. The rule of thumb is to be almost as formal in e-mail as you are in a standard letter.
- Always capitalize the appropriate words, be specific about needs, and use a proper closing.
- Use the subject line that is provided on the e-mail form. This line should be concise but convey the purpose of the message to the reader.
- If you are replying to a message but are changing the subject of conversation, change the subject line also.

- Edit and proofread carefully. Do not send an e-mail that contains inaccuracies or incorrect grammar.
- Use complete sentences and paragraph structure.
- Capitalize and punctuate properly.
- Do not run sentences together; it is difficult to read e-mail constructed in this manner.
- Insert the nature of the message on the subject line.
- Include a salutation.
- Use a colon after the salutation. A comma can be used in a nonbusiness application.
- Check the letter for spelling and grammatical errors.
- Insert a blank line after each paragraph.
- Always include your name and title (if appropriate) when replying to an e-mail.
- Assume that any message you send is permanent. The message can be sitting in someone's private file or in a tape archive.



SELF-REFLECTION

How are my writing skills? What is my experience writing letters? What do I remember from English classes in high school? What was the content that I thought I would never use but now need? How could writing skills have been taught to me when in high school that would have made the information more useful then? Where can I get additional help in writing skills?

E-mail Ethics and Etiquette

There is a growing body of ethical issues in regard to e-mail. Some organizations have developed a code of ethics for using e-mail. This form of communication should follow the same ethical guidelines used for any form of written communication in the massage practice:

- Do not send personal e-mail from your office computer.
- When people send you inappropriate e-mail, let them know politely that you cannot receive it.
- Do not use e-mail to berate or reprimand anyone.
- Do not use e-mail to send information that involves any type of legal action; third parties who should have no knowledge of the action may obtain the information.
- Do not forward junk mail or chain letters.
- Do not forward an e-mail unless you know it is true.
- Do not include credit card numbers or any other information that can contribute to identity theft or that presents a security risk, such as driver's license, social security number, or bank account number.
- Do not forward confidential client information.
- Do not criticize or insult third parties.
- Avoid using different types of fonts, colors, clip art, and other graphics in e-mail. It clutters the message and may be difficult for the reader to view.
- Do not keyboard your message in all uppercase.

- Avoid sending messages when you are angry.
- Observe the Golden Rule in cyberspace; treat others as you would like to be treated.
- Act responsibly when sending e-mail or posting messages to a discussion group.
- Use a style and tone that are appropriate to the intended recipient.
- Before you reply to an e-mail, ask yourself if you really need to reply.
- Answer your e-mail promptly.

The contents of the letter can be retained as a permanent record. Anything you do not want written documentation of should not be entered. Confidentiality must be maintained, and rules of courtesy should be followed. An appropriate closing should be included.

OTHER TYPES OF WRITTEN COMMUNICATION

Other types of written communication routinely used include post cards, interoffice memoranda, and manuscripts. For many of these documents, there are templates available

that aid in formatting and eliminate the steps of setting up the document.

Post Cards

There will be times when it is more practical to send a client a post card than to write a letter. Post cards can be used to announce special events such as a self-massage class being offered as a promotion for new clients. Figure 9-13 illustrates how a postal card should be addressed and the placement for them message.

Interoffice Memoranda

Although most office correspondence is keyboarded on office letterhead, the *interoffice memorandum* is a time-saving form and is entered on plain paper (Fig. 9-14). This type of communication is often used within a clinic or group practice or within a professional building where several professional offices are located. The form provides space for the name of the department or individual to whom the memorandum is being sent, the date, subject or reference line, and space for the sender's name. The memorandum should be brief, clearly stated, well organized, and

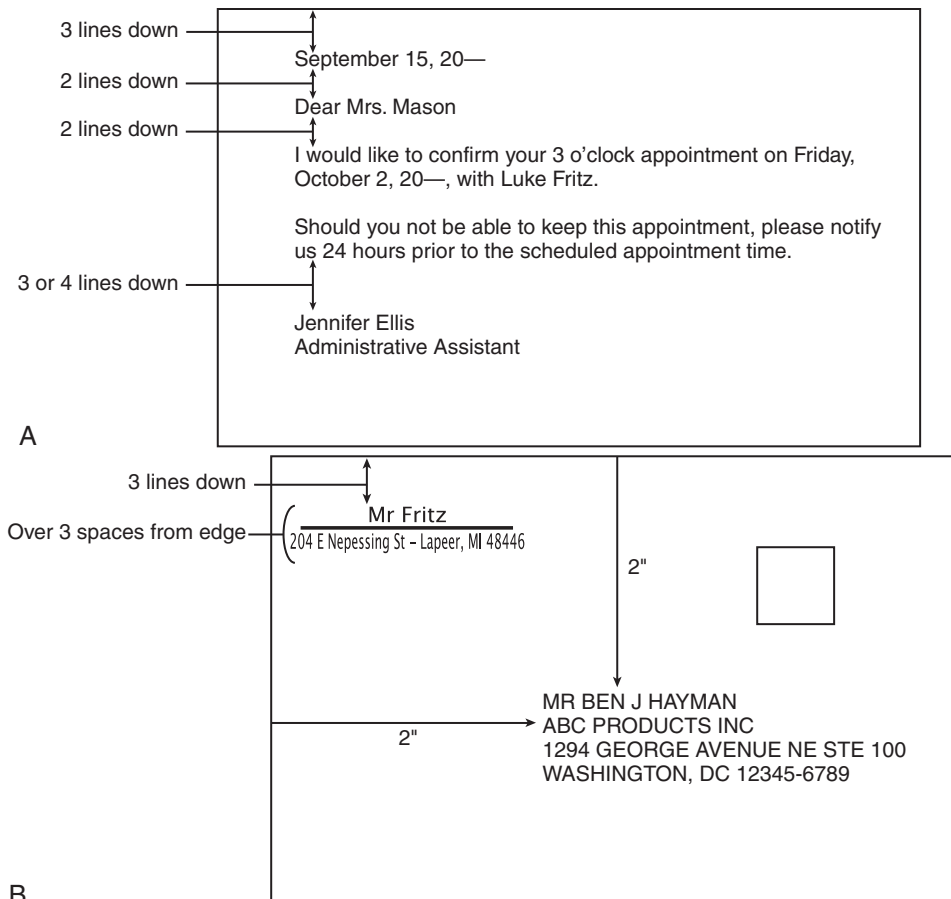


FIGURE 9-13. A, Message on a 5.5 by 3.5 inch post card. B, Addresses on a post card. (Modified from Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)



FIGURE 9-14. Interoffice memorandum.

easy to read. A copy of the memorandum should be made for the office files. If several people are to receive the memorandum, their names are inserted in the space provided, or additional copies are made and the individual names entered on each memorandum.

MANUSCRIPTS

In the first part of this chapter, emphasis was placed on general correspondence. In academic and health environments, you may be asked to write a report or research paper. The massage community is emphasizing the creation of case reports by massage therapists. These reports are being collected and completed to identify trends that indicate the need for further research. The foundation also has an open-access journal in which the case reports may be posted for others to read (Box 9-17). Whether you are writing a business report or an academic report, you should follow standard style when preparing it.

Many styles exist for manuscript preparation, depending on the nature of the report. Each style requires the same basic information. For example, one style may use the term *bibliography*, whereas another uses *references*, and a third prefers *works cited*. Although a publisher may provide the author with a format for a manuscript, a popular documentation style used for research papers is provided by the Modern Language Association (MLA). When preparing a paper, you must adhere to some form of documentation style. Therefore, if none is given, it is wise to select the MLA style, which includes the following:

- Use 8.5 by 11 inch paper.
- Double-space all pages of the paper with 1-inch top, bottom, left, and right margins.
- Indent the first word of each paragraph one-half inch from the left margin.
- At the right margin of each page, place a page number one-half inch from the top margin and 1 inch from the right margin. Double space between the header and the body. Only use Arabic numbers; do not use pp, p, or the # sign.
- On each page, precede the page number with the author's last name.
- When a quotation contains less than six lines, set it off with quotation marks, and keep it within the normal text, followed by the reference. When a quotation contains six or more lines, set it off by indenting it 1 inch from the right and left margins. Check MLA sources for other requirements regarding longer quotes, special circumstances, and quotations within quotations.
- Each figure and table needs to be labeled and numbered. Place the words *figure* or *table* (and the number) a double space before the figure or table. Other materials, such as charts, photographs, and drawings, also need to be labeled and numbered, and they should include a caption.
- No title page is required. Instead, on the first page, place only the author's name on the first line, and double space each successive line, followed by the instructor's name, the course name and number, and the date. This should be in a block at the left margin beginning 1 inch from the top of the page.
- Center the title four line spaces below the date and other related information (e.g., course number). The title's first,

BOX 9-17 The Massage Therapy Foundation

The Massage Therapy Foundation (<http://www.massagetherapyfoundation.org/>) advances the knowledge and practice of massage therapy by supporting scientific research, education, and community service.

JOURNAL

The Massage Therapy Foundation publishes the electronic journal, *International Journal of Therapeutic Massage & Bodywork: Research, Education, & Practice* (IJTMB). The IJTMB is a peer-reviewed scientific journal for the therapeutic massage and bodywork profession, and it is available free of charge.

The IJTMB takes an open-access approach to scholarly publishing, allowing the reader to access articles online. This approach enables dissemination of scientific findings to a vast number of professionals in the massage and bodywork field.

The IJTMB is published quarterly, and the first edition was launched in the summer of 2008. Three principal sections are planned for the IJTMB:

Research: Quantitative, qualitative, and integrative research papers are published in this section.

Education: This section provides a forum for massage and bodywork educators on topics such as curriculum development, instructional design, and testing.

Clinical Practice: This section represents a venue for practitioners to stay up-to-date on issues such as planning, marketing, managing, and evaluating successful practice.

MASSAGE THERAPY FOUNDATION PRACTITIONER CASE REPORT CONTEST

The Massage Therapy Foundation is delighted to invite you to participate in our Practitioner Case Report Contest. The Foundation has chosen to encourage the writing of case reports to provide an opportunity for massage therapists and bodyworkers to develop research skills and enhance their ability to provide knowledge-based massage to the public. The Foundation is a philanthropic, nonprofit 501(c)(3) organization that grants money for scientific research and community service projects, and it is a resource for research education to the massage and bodywork professions at large. (See the Foundation's mission and goals in Appendix A.)

Case Report Goals and Guidelines

Case reports play an important role in the professional literature. This contest is intended to enhance professional development skills of the practitioner: writing case reports help develop communication skills, critical thinking skills, and could contribute to future research and clinical practice. Cash and publication recognition will be awarded to practitioners submitting the top reports. (See the awards in Appendix H.)

Continuing Education credit is available through the National Certification Board of Therapeutic Massage and Bodywork (NCBTMB) for submitted reports that follow all guidelines. (See Appendix G for more information.)

Case Report Structure

Practitioners must report on an independent clinical intervention(s) on one client. This includes doing a literature review on the presenting condition; creating and implementing a treatment plan in accordance with the literature, the needs of the client, and the practitioner's expertise; writing up the results; discussing the implications of the outcomes; and offering suggestions for future study.

For complete details, including the referenced appendices, visit the Web site (<http://www.massagetherapyfoundation.org/practitionercontest.html>).

Modified from <http://www.massagetherapyfoundation.org>.

last, and principal words should be capitalized. Do not underline, italicize, or use all capitals in the title. Do not end with a period. A question or exclamation mark may be used if appropriate.

Place reference citations in the body of the paper in parentheses with the page numbers where the referenced information is located. These parenthetical citations are used instead of footnoting each source at the bottom of the page. Footnotes are used only for explanatory notes. In the body of the paper, use superscripts (raised numbers) to signal that an explanatory note exists. Explanatory notes are optional. If used, the note is placed at the bottom of the page as a footnote or at the end of the paper as an endnote.

MLA style uses the term *works cited* for bibliographic references. These are placed on a separate numbered page. Center the title (Works Cited) 1 inch from the top margin. List

references in alphabetical order by each author's last name. Double space all lines. Works cited from books, journals, magazines, newspapers, letters, online sites, and compact disks have their own MLA reference style that should be followed.

MANAGING BUSINESS MAIL

With the increase in written communications, demands for efficient processing and distribution of incoming and outgoing mail need to be addressed.

Processing Outgoing Mail

Outgoing correspondence may be prepared earlier in the day, but it is often organized for mailing at the end of the day as part of the daily routine.

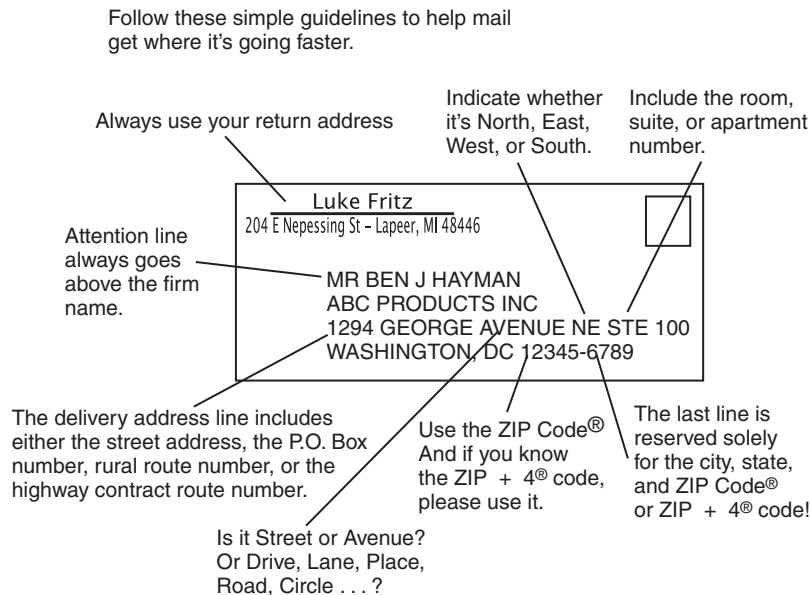


FIGURE 9-15. Guidelines recommended by the U.S. Postal Service for addressing mail correctly. (Modified from Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6. St. Louis, 2006, Mosby.)

CLASSIFICATION OF MAIL

Some of the outgoing mail is sent as first-class mail, some as fourth class, some insured, and some special handling using the address guidelines in Figure 9-15. You need be aware of these classes of mail and be able to select the best classification for the type of item being mailed:

- First-class mail consists of letters, government or private postcards, business reply mail, bills, and statements of accounts.
- Second-class mail includes newspapers and published periodicals.
- Third-class mail includes items such as books, circulars, catalogs, or miscellaneous printed material weighing less than 16 ounces.
- Fourth-class mail, often called parcel post, is used for printed material and packages weighing more than 16 ounces. The rate of postage varies, depending on distance. The United States is divided into zones, and parcel post rates are figured accordingly.

Although mail is classified in one of these four classifications, additional special services may be used. If sent first class, valuable or important items can be registered to provide protection and evidence that the article has been received. A special fee is charged for this service, and a receipt is furnished by the post office. The post office accepts the responsibility if the mail is lost and will pay the sender the insured amount. The fee for registered mail varies according to the declared value.

Special delivery service is available for all classes of mail. The post office delivers special delivery mail as quickly as it reaches the post office of destination. Rates are determined by weight and destination.

Certified mail is available for first-class mail. The sender is provided a receipt, and proof of delivery of the letter is recorded at the post office. No insurance coverage is available on certified mail.

Insured mail service applies to third- and fourth-class mail; articles may be insured up to a value of \$200 against damage, theft, or total loss. The fee for insured mail is determined by the amount of the insurance on the package contents.

Special handling service is available only for third- and fourth-class mail. If the mail is marked “special handling,” it receives the fastest handling of third- and fourth-class mail, but it is not delivered by special messenger.

Express mail service is provided by the U.S. Postal Service, and delivery occurs within 24 hours. Express mail service is available 7 days per week, 365 days per year (weekend and holiday deliveries are no additional charge) for items that weigh up to 70 pounds and are 108 inches in combined length and girth.

Other questions that arise regarding outgoing mail can be answered by checking with the U.S. Postal Service. Manuals are available from the Superintendent of Documents, Government Printing Office, Washington, DC 20402 (Domestic Mail Manual, 19 and International Mail Manual, 14).

A postage scale is used to determine the weight of outgoing mail and is an asset in the massage business office. Mail sent with insufficient postage may be returned to the sender, causing a delay in service. A postage meter can be a time-saving device. Although various sizes of postage meters are available, a desk model is practical for a private practice. The meters are purchased outright, but the meter mechanism is leased. A meter license is obtained from the U.S. Postal Service. With new electronic models, meter resetting

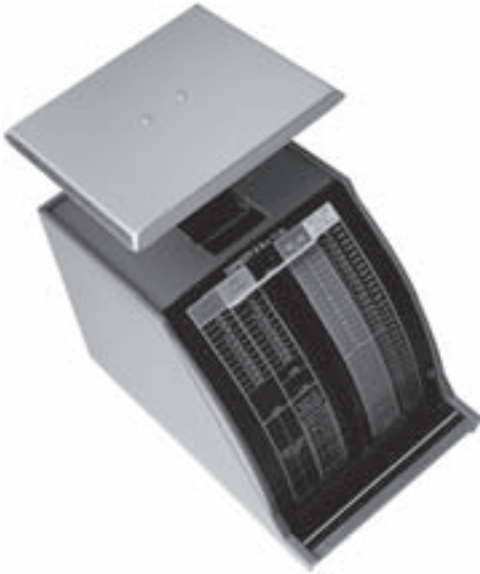


FIGURE 9-16. Postage meter. (From Finkbeiner BL, Finkbeiner CA: Practice Management for the Dental Team, ed 6, St. Louis, 2006, Mosby.)

is done by means of a telephone call. An active account with the Postage-By-Phone System and the appropriate meter are needed. No special telephone hookups, computers, or software are required. The customer signs up for the system and then places funds into an account to draw on as postage is ordered. Monthly reports listing the account activities are sent to the customer. In keeping with this new technology, postage scales are available that weigh and automatically determine correct postage rates (Fig. 9-16). The accuracy of electronic scales helps to eliminate overpayment in postage. The meter can also be set for the amount of postage required for packages. The amount is printed on a tape, which is then affixed to the package.

Outgoing mail that is addressed correctly, has the proper amount of postage, and is pre-postmarked goes through the post office faster and will arrive at its destination sooner.

FACSIMILE

Another electronic means of communication is the facsimile (fax) machine. A fax machine is a scanning device that transmits an image of a document over standard telephone lines. It is described in detail in Chapter 10. The massage therapist may find this method of transmitting written communication very effective when it is necessary to have an immediate response. Transmission requires a transmission cover sheet, and transmitted information must be maintained confidentially.

MAILING AND DELIVERY SERVICES

Mailing services are service enterprises that specialize in mail communications. A mailing service is an independent postal service that is a complete business center that

processes metered and bulk mail, first-class mail, and air freight.

Shipping providers, such as United Parcel Service (UPS), FedEx, Greyhound Package Express, Purolator Courier, and many others, are gaining popularity with businesses that wish letters or packages delivered the next day. When selecting a provider, it is important to consider the cost, speed of delivery, and convenience. Most shipping providers require the completion of a special form. The following list provides information about delivery services:

- Rates are determined by weight, distance within specified zones, and required time of delivery.
- Maximum weight varies with the carrier.
- Some packages may be insured against loss or damage.
- Packages to be shipped can be picked up at the place of business. Deliveries are made to the exact address indicated on the shipping label (Fig. 9-17).
- Deliveries are not made to post office boxes.
- Attempts are made for delivery at no additional charge, except for U.S. Express Freight Services.
- The sender is not charged for return of an undeliverable package.
- Shipping providers are available in most areas.

Processing Incoming Mail

The location of the massage practice may determine whether the mail is delivered to the office by a regular postal mail carrier or a post office box is rented and the mail is picked up at the post office.

When the mail is first sorted, you will need to distinguish between the various types of mail received:

- First-class mail, including priority mail, personal mail, special delivery, registered or certified mail, payments, invoices, and general correspondence
- Printed matter, such as announcements of professional meetings, solicitations for contributions, collegiate newsletters, and other semiprofessional materials
- Magazines and newspapers for the reception room, as well as professional journals and periodicals
- Advertisements
- Samples of massage products
- Supplies ordered from a massage supply company

After the initial sorting, the personal mail receives prompt attention. When payments are received, attach the returned portion of the statement, or note on the envelope the amount of money received. Enclosures should be clipped to the letter, invoice, or statement, and all incoming correspondence should be stamped with the date and time received (Fig 9-18).

When discarding the envelopes of incoming mail, be sure the entire contents have been removed and all important



FIGURE 9-17. Packaged delivery to a place of business. ([2008] © Stephen Coburn. Image from BigStockPhoto.com.)



FIGURE 9-18. Automatic time-stamping machine. (From Young AP: Kinn's *The Administrative Medical Assistant*, ed 5, St. Louis, WB Saunders, 2003.)

data, such as company name, individual name, postmark date, and time (if significant), have been recorded. You may even need to retain the envelope in some situations. The magazines for the office should be distributed to the reception room and the older issues removed and recycled.

Businesses receive many advertisements, and many of them are regarded as junk mail. If the advertisements are of no value, throw them away.

When massage supplies are received in the office through the mail, they need to be processed as soon as possible. This

Luke Fritz
204 E Nepessing St – Lapeer MI 48446

**INTEROFFICE
ROUTING SLIP**

Please read the attached _____
and record the date passed on to the persons indicated.

Refer to:	Date Received	Date Passed on
Stephen Austin	_____	_____
Hilda Baker	_____	_____
Blair Downing	_____	_____
Debbie Green	_____	_____
John Mann	_____	_____
Stephanie Powers	_____	_____
Routed by:	_____	_____

FIGURE 9-19. Mail routing slip. ☹ This letter template is posted on Evolve at <http://evolve.elsevier.com/Fritz/business>.



Good Stuff from the Government

UNITED STATES POSTAL SERVICE TOOLS

All of the following items can be found at <http://www.usps.com>.

- Shipping products and services: Send domestic and international packages.
- Print online postage: Print postage and labels online using USPS Click-N-Ship or an authorized provider.
- Supplies: Boxes, scales, labels, and more.
- Mailing products and services: Domestic and international mailing choices.
- Create your own cards: Create unique greeting cards, gift cards, postcards, and more.
- Create direct mail: Learn more about direct mail or create direct mailings online.
- Change of address: Get your mail after you move. Change it online.
- PO box service: Get your mail when and where you want it.
- Hold mail: Have your mail held while you are away.
- Mail service updates: Check updates in your area.
- Missing children: USPS helps find America's missing kids.

procedure is detailed in the inventory chapter (see Chapter 12). Open any samples received in the mail. Most of these samples accompany literature that should remain with the product. If it is not something you intend to use throw it away.

SUMMARY

Different forms of written communication are used within a massage practice. You may have to write a letter to a client regarding payment schedules or to the insurance company.

You may use email to confirm client appointments or send a thank you to a client for a referral, and the SOAP notes need to be written correctly and coherently.

For certain types of writing, you will want to use stationary with your name or company name at the top, also be known as letterhead. This paper is usually a heavier quality paper than you would use for everyday copying. Whatever the reason for writing, you need to use correct grammar, punctuation, style, and capitalization. The word processing programs are almost foolproof, so use them.

Be sure to chuck the junk. Your business space needs to be clutter free. Junk mail and old magazines can become clutter and lead to disorganization. Recycle the old magazines, open and discard the junk mail, and take care of the current mail.

Bibliography

- Capital Community College Humanities Department: *A guide for writing research papers based on modern language association (MLA) documentation*, Hartford, CT, 2004, Capital Community College, Available at <http://www.ccc.commnet.edu/mla/index.shtml> (accessed June 2009).
- Federal Express Corporation: *FedEx Service Guide*, Memphis, 2004, Federal Express.
- Fulton PJ: *General Office Procedures for Colleges*, ed 12, Cincinnati, 2003, South-Western.
- Gibaldi J: *MLA Handbook for Writers of Research Papers*, ed 6 (for high school and undergraduate students), New York, 2003, Modern Language Association of America.
- Gibaldi J: *MLA Style Manual and Guide to Scholarly Publishing*, ed 2 (for graduate students, scholars, and professional writers), New York, 1998, Modern Language Association of America.

Locker KO: *Business and Administrative Communication*, ed 6, New York, 2003, McGraw-Hill/Irwin.

Modern Language Association: Format, Bibliography, Style Conventions. Available at <http://www.mla.org> (accessed June 2009).

Netiquette tips: Keying in, *Newslett Natl Business Educ Assoc* 11:2, 2000.

Sabin WA: *The Gregg Reference Manual*, ed 10, New York, 2004, McGraw-Hill/Irwin.

U.S. Postal Service: *The Postal Manual*, Washington, DC, U.S., 2004, Government Printing Office.

Evolve Annotated Web Links

<http://evolve.elsevier.com/Fritz/business>

Capital Community College, Guide for Writing Research Papers Based on MLA Documentation: <http://www.ccc.commnet.edu/mla/index.shtml>

Massage Therapy Foundation: www.massagetherapyfoundation.org

Modern Language Association (MLA): www.mla.org, <http://www.mla.org/style>

U.S. Postal Service: www.usps.com

Workbook

1. List and explain the characteristics of effective letter.

2. Explain the benefits a newsletter may have for a massage practice.

3. Outline the acceptable format for a dressing envelope.

4. Outline the procedures for sorting incoming mail.

5. List and define the four classifications of mail.

6. Discuss the special mail services that can be used by a massage office.

7. Explain the functions of a postage meter.

8. List the advantages of using a commercial delivery service.

9. Explain a situation that can be handled through a fax process.

10. On the computer, create a file a letterhead for Joseph W. Lake, Massage Therapist, and Ashley M. Lake, Massage Therapist. Use the letterhead data found in this chapter for the massage therapists. If desired, add clip art as appropriate.

11. Using the letterhead created in #10 (Font: Times New Roman), keyboard the following letters.

Keyboard the following letter in block style with mixed punctuation. Use the current date, and address a small envelope. Fold the letter to insert into a small envelope. Make a copy for the office files, or store it electronically:

Mrs. Jason Calloway, 2453 Prescott Avenue, Grandville, MI 49302. Dear Mrs. Calloway (P) We have written to Doctor Jack Notman as you requested. He is most interested in your case and will be expecting you to contact his office very soon. (P) When we first corresponded with Doctor Notman, we mailed him a complete set of your client records as requested. We also indicated to him at that time that you are a diabetic. (P) I suggest you contact his office. If we can be of further assistance, do not hesitate to call us. Sincerely Joseph W. Lake, Massage Therapist (reference initials)

Keyboard the following letter in modified block style with open punctuation. Use the current date, and address a large envelope. Fold the letter to insert into a large envelope. Make a copy for the office files, or store it electronically:

Reliance massage tables, 1600 Michigan Avenue, NE, Grand Rapids, MI 49502. Gentlemen (Subject line: massage table defect) (P) I am returning the massage table we ordered for our client, Mr. H. B. Rider. Mr. Rider was impressed with the massage table used in our office and asked if we would be able to order a table for him to have at home. The table arrived at our offices with a crack in the front left table leg. We will be returning the table for replacement and would expect that your company pay for all shipping and handling. We appreciate your cooperation in this matter. Sincerely, Joseph W. Lake, Massage Therapist (reference initials)

Keyboard the following letter in block style with mixed punctuation. Use the current date and an appropriate-size envelope. Make a copy for the office files, or store it electronically:

Mr. Robert Clay, 6690 Jefferson SW, Wyoming, MI 49507. Dear Mr. Clay (P) I know you have been pleased with the work our office has done for you and your wife. We have enjoyed having both of you as clients. (P) We feel sure you have misplaced the last two statements that we have sent to you, but we would appreciate it if you would stop by the office so we can make an arrangement to bring your account up to date. (P) Thank you for your cooperation in this matter. Sincerely, Ashley Lake, Massage therapist.

12. Develop a newsletter to be sent by e-mail to your client list that is announcing new research on the use of massage for pain management. A newsletter can be a valuable marketing tool, but it is not a sales pitch. Instead, it provides information essential to your clients. It educates your clients about your company's position and your commitment to servicing their needs. It is better to have a lean newsletter than one full of fluff that shows you do not value your clients' time.