PROCEDURES--SECRETARIAL

A. Correspondence

All correspondence leaving your office represents the university, your office, your manager, and you; therefore, it should be of the highest quality. A letter or an interoffice memorandum reflects the quality of the office and the people generating such correspondence in a way which cannot be erased. The secretary should take pride in the quality of each item that leaves the office.

1. Transcription of machine dictation

An efficient transcriber listens to all corrections before beginning to transcribe. This saves time and additional corrections. Special instructions also may be given by the dictator and usually dictated at the beginning of the tape or cassette.

As you begin to transcribe, learn to operate the foot pedal so that you can type at a continuous pace. If you do not understand a word or phrase, use the reverse on the foot pedal to have the word or phrase repeated.

You should proofread the material before removing it from the typewriter or before printing from your PC. Proofreading includes reading for accuracy and sense, checking the spelling of names and places as well as the appropriateness of punctuation, and looking for typographical errors.

Before printing from your PC, operate the spellchecker on your word processing program.

NOTE: The first time you proofread a document, read for content. Start at the top and read down from left to right in the normal manner. The second time, start at the bottom and read to the top from right to left. Because the words do not make sense when read backwards, your attention is focused on each isolated word and misspellings are easier to see. Also, consider having someone else in your office proofread your work if the document is not of a sensitive nature.

Put the final letter(s) in a folder for the manager's signature. Enclosures, if appropriate, and addressed envelopes should accompany the letters. The folder will keep the letters clean and protect any confidential material.

2. The business letter

"Letters, like people, have personalities which attract or repel." Lord Chesterfield, the author of this quotation, was stating an extremely important point--the letter <u>is</u> the sender. Every letter should promote goodwill for the manager and for Ball State University.

a. Letters the secretary writes

Many times the secretary is asked to write letters in response to some routine correspondence. Often s/he must write letters of a timely nature when the supervisor is out of town. The following are some general rules for the writing of these letters:

- (1) Plan letters carefully. Present thoughts in a logical order.
- (2) Make the opening paragraph short, a brief expression of the reason for writing, e.g., "Thank you for your letter of February 1, 20-."
- (3) When possible, end the letter with a request for action.
- (4) Eliminate stock phrases from the writing. The list below is a sample; add others as they come to mind.

<u>Instead of</u>	<u>Use</u>	
for the purpose of	for	
preparatory to	before	
in order to	to	
make inquiry regarding	ask about	
afford an opportunity	allow	
for the simple reason that	because	
at the present time	now	
due to the fact that	because	
experience indicated that	we learned	
in a position to	can	
until such time as	until	
in the course of	during	
pursuant to your request	as you requested	
hold in abeyance	wait	
at an early date	soon	

(5) Avoid stringing together redundant words, which produce sentences that are unnecessarily long.

Use

first began	began
completely finished	finished
first and foremost	first
each and every	each
true facts	facts
true racts	racts
past experience	experience

Instead of

(6) Use positive statements. For example:

<u>Negative</u> <u>Positive</u>

If we can help, please do not Please call on us

hesitate to call us. when we can help you.

We are sorry we cannot send You will have this

this material by September 1. material by September 10.

(7) Double check the spelling of words which are commonly misspelled. For example:

accessible convenience
accommodation disappointment
acknowledgment maintenance
benefited occasionally
bookkeeper privilege
congratulate until

- (8) Make the letter structurally perfect. Examples of letter formats are included in this Handbook.
- (9) If additional information concerning written communications is needed, consult any of the following reference books, which are available in Bracken Library.

- Anderson, Laura Killen. <u>Handbook for Proofreading</u>. Lincolnwood, Illinois: NTC Business Books, 1990.
- Baddock, Barry. Professional Writing. New York: Prentice Hall, 1989.
- Baugh, L. Sue. <u>Handbook for Memo Writing</u>. Lincolnwood, Illinois: NTC Business Books, 1990.
- Bjelland, Harley. Business Writing the Modular Way. New York: AMACOM, 1992.
- Dumaine, Deborah. Write to the Top, Writing for Corporate Success. New York: Random House, 1989.
- Frailey, L. E. <u>Handbook of Business Letters</u>. Englewood Cliffs, New Jersey: Prentice Hall, 1989.
- Gorenstein, Helen. <u>Put It in a Memo: A Practical Guide to Persuasive Business Writing</u>. Boston: Houghton Mifflin Company, 1991.
- Keithley, Erwin M. <u>Manual of Style for Business Letters Memos and Reports</u>. Cincinnati: South-Western Publishing Co., 1989.
- Lesikar, Raymond V. Basic Business Communication. Homewood, Illinois: IRWIN, 1988.
- P-H Editorial Staff. <u>The Secretary's Desktop Library</u>. Englewood Cliffs, New Jersey: Prentice Hall, 1990.
- Poe, Roy W. <u>The McGraw-Hill Handbook of Business Letters</u>. New York: McGraw-Hill Book Company, 1988.
- Seglin, Jeffrey L. The AMA Handbook of Business Letters. New York: AMACOM, 1989.
- Sturgeon, Linda Braxton. <u>Personal Letters that Mean Business</u>. Englewood Cliffs, New Jersey: Prentice Hall, 1991.
- Thomsett, Michael C. <u>The Little Black Book of Business Reports</u>. New York: AMACOM, 1988.

a. Letter styles

Several examples of letter styles follow. Use of the block style is recommended because it is more efficient. However, the secretary should conform to his/her manager's wishes on the letter style to be used within the office.

The post office prefers that envelopes be typed in all capital letters with abbreviations but no punctuation. For consistency, the inside address should match the envelope.

b. Blind photo copies

The initials <u>bpc</u> (blind photo copy) are typed when the addressee need not know that a copy of the letter is being sent to someone else.

The blind photo copy notation should not be typed on the original copy being sent to the addressee. It should be typed on the copy going to the concealed person or firm as well as on the file copy. The notation is normally typed below the reference initials or enclosure notation. For example:

ri

Enclosures 2

pc: N. 0. Brown

bpc: S. R. Jones (typed on his/her copy and the file copy)

An envelope should be prepared for the person receiving the blind photo copy. Place a check mark after his/her name on the copy. The check mark will remind you to send that copy.

c. Addressing envelopes

Because the use of the ZIP code has changed, the mail sorting process has led the way to a machine known as the Optical Character Reader (OCR); thus, the rules for addressing envelopes have changed. Here are the rules <u>recommended</u> by the U.S. Post Office.

- (1) Use the two-letter abbreviations for state names. (These abbreviations are included in this Handbook.)
- (2) Leave two (2) spaces between the state abbreviation and the ZIP code. (A ZIP Code Directory for Muncie, IN is included in this Handbook.)

- (3) Type arrival directions, such as "Confidential" or "Please Forward," four (4) lines below the return address.
- (4) Block the address lines. Do not arrange them in indented form. Use of upper case characters with no punctuation is preferred by the Post Office.
- (5) Single space the address lines.
- (6) Foreign country names must be in <u>all capital</u> letters and appear in full as the <u>last item</u> in the address.
- (7) Special mailing instructions should be typed on the envelope below the stamp and approximately three (3) line spaces above the first line of the address.

BALL STATE UNIVERSITY U. Human Resource Services Muncie, Indiana 47306-0740

CONFIDENTIAL

AIRMAIL

LARRY R SMITH UNIVERSITY PUBLISHERS INC 500 OLIVE STREET ST LOUIS MO 63101-3670

(8) When using an attention line, it should be typed after the name of the company. For example:

UNIVERSITY PUBLISHERS INC ATTN MR LARRY R SMITH 500 OLIVE STREET ST LOUIS MO 63101-3670

The Ball State University letterhead envelope is purchased through Printing and Duplicating on a B-23 "Reproduction Center Requisition." Central Mailing will charge the department budget for postage when the envelopes are mailed.

If a letter is to be sent by other than first-class mail, attach a note to the envelope to notify Central Mailing. You also may type instructions such as "AIRMAIL" on the envelope.

Special notations should also be noted on the letter above the inside address. Since the department name already will be printed in the upper left corner of the envelopes ordered from Printing and Duplicating, the secretary will no longer have to type it in.

Only mail to be sent off campus should be put in letterhead envelopes. Use a plain white envelope for confidential correspondence, seal it, and put it in a Campus Mail envelope. The re-usable Campus Mail envelopes are to be used for on-campus mail delivery only.

Note that the department name is preprinted on the BSU letterhead. The last four digits of the ZIP Code allow Central Mailing to charge postage to the correct department. For assignment of the last four digits of the ZIP, call the Executive Director of University Communications (5-1560).

d. Correct forms of address

A complete list of correct forms of address can be found in a good dictionary or secretarial handbook. A list of titles most often used follows on the next pages.

e. Names or reference initials

No correspondence should leave the office without either a sender's name or the reference initials of the typist. If a piece of correspondence, even a flyer, uses only a department name as the sender and there are no reference initials, time often is wasted when trying to trace back correspondence to the typist, especially in larger offices.

f. Filenames in closing lines

With the increased use of word processing software and the storing of correspondence on disks, it is acceptable to type a filename on the outgoing letter. A sample of how the filename could be typed is: (letterjul.26). This notation in parentheses is typed a double space below the reference initials.

g. Bulk Mailing

If possible, have your larger flat size pieces of mail folded to letter size for increased savings. Your letter size mail will be processed by the post office in a more timely manner.

<u>Name</u>	Explanation	Salutation
Title of Individual(s):		
Mr. David Jones	A Man	Dear Mr. Jones
Mrs. Jennifer White or Mrs. William White	A married woman a widow	Dear Mrs. White
Miss Cynthia Hoover	An unmarried woman	Dear Miss Hoover
Ms. Mary Davis	Marital status unknown	Dear Ms. Davis
Mr. George Tillis Mr. William Brown Address	Two or more men	Gentlemen Dear Mr. Tillis and Mr. Brown
Messrs. Brown, Smith, and I Address	Jones	Gentlemen Dear Messrs. Brown, Smith, and Jones
Ms. Barbara Knolls Ms. Sharon Keller Address	Two or more women	Ladies Dear Ms. Knolls and Ms. Keller
Mss. Knolls, Keller, and Pet Address	ers	Ladies Dear Mss. Knolls, Keller, and Peters
Mmes. Lee & Gates or Blake Incorporated	Two or more women or a firm of women Mesda	
Mr. and Mrs. Sam Mills	Husband and wife	Dear Mr. and Mrs. Mills
<u>University Titles</u> :		
President John R. Smith	President	Dear President Smith
or Dr. John R. Smith, President	i	Dear Dr. Smith
Dean John R. Smith or	Dean	Dear Dean Smith
Dr. John R. Smith, Dean		Dear Dr. Smith

Name	Explanation	Salutation
Professor John R. Smith		Dear Professor Smith
or Dr. John R. Smith Professor of Economics		Dear Dr. Smith
Dr. David Harris	Used with the name of any person having a degree containing the letter "D"; as, M.D.,LL.D., D.D., Ph.D., D.D.S., Ed.D., etc.	Dear Dr. Harris
Robert A. Curtis, M.D.	When a professional	
or Dr. Robert A. Curtis	degree is used, no title should appear before the name.	
Religious Titles:		
Name	Address	Salutation
The Pope	His Holiness Pope John Paul II 3 Vatican City Rome ITALY	Your Holiness Most Holy Father Complimentary Close Respectfully yours
An Archbishop	The Most Reverend John R Smith Archbishop of Cincinnati The Chancery 28 East Eight Street Cincinnati, OH 45202	Your Excellency Dear Archbishop Smith
Priest (Catholic) or (if having doctorate)	The Reverend John R. Smith St. Joseph Rectory 164 Lansing Place Mobile, AL 36607	Dear Father Smith
A Sister	Sister Mary Angelica, S.C. St. Catherine's School	Dear Sister Dear Sister Mary Angelica

Rochester, KN 55901

Address Salutation Name A Bishop The Right Reverend Right Reverend Sir (Episcopal) John R Smith Dear Bishop Smith Bishop Of New York The Bishop's House New York, NY 10010 The Reverend Dear Mr. Smith A Minister John R. Smith (if having doctorate) The Reverend Dear Dr. Smith Dr. John R. Smith Immanuel Presbyterian Church Milwaukee, WI 53211 A Rabbi Rabbi John R. Smith Dear Rabbi Smith or (if having doctorate) Rabbi John R. Smith, D.D. Dear Dr. Smith Congregation Emanu-El B'ne Jeshurun Milwaukee, WI 53211 **Government Officials:** President of the U.S. The Honorable Mr. President George W. Bush My dear Mr. President President of the United States The White House Dear Mr. President Washington, DC 20500 Complimentary close: Respectfully yours Very respectfully yours Senator The Honorable **Dear Senator Smith** Madam (or Sir) Amelia R. Smith **United States Senate** Washington, DC 20510 Representative The Honorable Dear Madam (or Sir) Amelia R. Smith Dear Representative Smith United States House of Representatives Washington, DC 20515 The Honorable Sir (or Madam) State Representative John R. Smith Dear Mr. Smith House of Representatives Columbus, OH 43215

Name Address Salutation

Mayor The Honorable Amelia R. Smith Madam (or Sir)

Mayor of Chicago Chicago, IL 60601 Dear Mayor Smith

Military Personnel:

The address of both officers and enlisted men in the armed services should include title of rank, full name followed by a comma and the initials USA (United States Army), USN (United States Navy), USAF (United States Air Force), USMC (United States Marine Corps), or USCG (United States Coast Guard).

Army, Air Force, and Marine Corps Officers:

Lieutenant General Arthur Sakievich, USA Dear General Sakievich

Address (NOT: Dear Lieutenant General Sakievich)

For first and second lieutenants, use: Dear Lieutenant (name)

Navy and Coast Guard Officers:

Rear Admiral David Thebo, USCG Dear Admiral Thebo

Address

Enlisted Persons:

Sergeant Linda Nelson, USA Dear Sergeant Nelson

Address

Seaman Barry Fromm, USCG Dear Seaman Fromm

Address

Complimentary Close:
Sincerely yours is a
commonly used and
acceptable complimentary
close except where otherwise

indicated.

NOTE: On the following page, see inside address in all capital letters; this will be exactly what is typed on the envelope. This new rule is from the post office and business rules books.

FULL BLOCK STYLE (RECOMMENDED)

Sente	ember	10.	200	

JONES PUBLICATION COMPANY ATTN MRS SALLY LAUGHTON 845 W 11 AV CLEVELAND OH 43192-7825

Ladies and Gentlemen

This is a full block letter style. Every line of the letter begins at the left margin. This style is recommended because it is more efficient.

The inside address should consist of two or more lines. Notice that the Attention line is placed in the inside address. The Zip Code is typed two spaces after the state abbreviation. Consult the Zip Code Directory when the Zip Code is not known.

The salutation of the letter is determined by the first line of the inside address. When the first line is a company name, use "Ladies and Gentlemen." When the first line is a person's name (Mrs. Sally Jones), the salutation is "Dear Mrs. Jones." When the first line is a title (Personnel Manager), the salutation is "Dear Sir or Madam."

If several persons are to receive photocopies, their names are listed after the photocopy notation. The names are listed either by rank or in alphabetical order.

Open punctuation is used in this letter. Therefore, no punctuation marks are typed after the salutation and the complimentary close.

Sincerely yours

Anne Moore, Director

ri

pc: Betty Brown George Green

It is not necessary to type the initials "P.S." before a postscript added at the end of a letter.

SIMPLIFIED LETTER STYLE

September 10, 200___

MR PETER L SMITH 1940 MAPLE ST BOWLING GREEN OH 43402-1658

SIMPLIFIED LETTER STYLE

This is a letter style adopted by the Administrative Management Society for use in business letter writing. It has these features:

- 1. All lines are blocked at the left margin.
- 2. The inside address is typed at least three blank lines below the date.
- 3. The salutation and complimentary close are omitted.
- 4. A subject line is used, typed in all capital letters a triple space below the inside address. There is a triple space between the subject line and the body of the letter.
- 5. Numbered items are blocked at the left margin, but items that are not numbered are indented five spaces.
- 6. The writer's name and title are typed in all capital letters at least four spaces below the body.
- 7. Identification initials, consisting of the typist's initials only, are typed a double space below the writer's name. Enclosure or photocopy notations are typed below the initials.

This letter form saves space and time, thus helping to cut correspondence costs.

ANNE MOORE, DIRECTOR

ri

pc: Lewis Jones

MODIFIED BLOCK STYLE

September 10, 200

REGISTERED MAIL

CROWN MANUFACTURING COMPANY 2345 W MAIN ST ALBANY NY 23400-2618

Ladies and Gentlemen:

SUBJECT: The Business Letter

This letter is an example of modified block style with block paragraphs. This style can also be used with five-space paragraph indentions although indentions increase the use of the tab key thereby increasing the overall time it takes to prepare a letter.

Observe that special mailing instructions are typed in all capital letters above the inside address. The notation reminds the secretary how to mail the letter; it also emphasizes the importance of the letter to the reader.

The subject line is typed below the salutation; the word "subject" may be in all capital letters for extra emphasis. The complimentary close starts at the center of the page as did the date. The dictator's title may be typed on the same line as the name; or if the name or title happens to be long, it may be typed on the line below the name.

This letter uses mixed punctuation, which includes a colon after the salutation and a comma after the complimentary close.

Sincerely yours,

Anne Moore, Director

ri

pc: Richard Smith

TWO-PAGE LETTER (Modified Block--Indented Paragraphs)

September 10, 200___

MR ALEXANDER R WILSON WILSON & TURNER ASSOCIATES 433 S HIGH ST CHICAGO IL 60607-0085

Dear Mr. Wilson:

Subject: The Two-Page Letter

A letter that has over 300 words will require two pages. Even shorter letters may require two or more pages if there are quotations, tabulations, or enumerations. The size of type being used and the number of paragraphs will also affect the length of the letter.

If the letter requires two pages, use one-inch side margins and margins of at least one inch at the bottom of the first page and at the top of the second page. Use a letterhead for the first page and plain paper of comparable quality for the second and succeeding pages.

The reference line or heading is typed at the top of the second page. It can be blocked at the left margin on three lines or spread across the page on one line. It contains three parts:

- 1. The name of the addressee
- 2. The page number
- 3. The date

Triple space before going on to the body of the letter.

Enumerations can be made to stand out by indenting both the left and right margins and numbering the items. Quoted materials of three or more lines should be indented and no quotation marks used.

Tabulated materials should also be indented, as in this example:

	<u>June</u>	<u>July</u>
First Class Airmail	1,245 <u>1,516</u>	
TOTAL	2,761	2,757

If the title of the addressee is included in the inside address, it can be placed after the addressee's name on the first line or placed separately on the second line. It should be placed so that the lines of the inside address will be approximately of equal length. If the title or firm name is unusually long, it can be divided and carried over to the second line with an indention of three spaces, such as:

THE BYERSON AND NICHOLSON COLA MINING AND MANUFACTURING COMPANY 8 S ASTER LN CAPEVILLE VA 33134-2652

The identification or reference initials are those of the typist of the letter. The initials are placed at the left margin in lower case and generally are typed a double space below the last line of the signature block. Sometimes the identification initials of the dictator are typed before the typist's initials.

The purpose of typing "Enclosure" on a letter is to help the typist remember to include all enclosures—also to help the receiver of the letter check for the enclosed material. Enclosures may be itemized immediately following the enclosure notation. Although no enclosures would be needed for this letter, the notation is included as an example of its placement.

Sincerely yours,

Anne Moore, Director

ri

Enclosure

(BLOCKED 2ND PAGE HEADING)

Mr. Alexander R. Wilson Page 2 September 10, 200__

If the title of the addressee is included in the inside address, it can be placed after the addressee's name on the first line or placed separately on the second line. It should be placed so that the lines of the inside address will be approximately of equal length. If the title or firm name is unusually long, it can be divided and carried over to the second line with an indention of three spaces, such as:

THE BYERSON AND NICHOLSON COAL MINING AND MANUFACTURING COMPANY 8 S ASTER LN CAPEVILLE VA 33134-2652

The identification or reference initials are those of the typist of the letter. The initials are placed at the left margin in lower case and generally are typed a double space below the last line of the signature block. Sometimes the identification initials of the dictator are typed before the typist's initials.

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Sincerely yours,

Anne Moore, Director

ri

Enclosure

3. The interoffice memorandum

- a. An example of an interoffice memorandum form appears on the next page. It can be prepared on a typewriter or personal computer. The memorandum is an important link in communications between campus offices. Memos are sent to confirm meetings, report actions taken at meetings, to transmit information from one office to another, etc. Interoffice memos are not to be on Ball State University letterhead stationery--save this for external use only.
- b. Campus Mail envelopes are available for use in transmitting mail on campus. Write on the envelope the name of the person to whom the mail is to be sent and his/ her department. Any preceding information on the envelope should be canceled by drawing a line through it. Do not staple or seal the envelope. Incoming envelopes should be saved in order that they may be used again. These envelopes are available from Central Stores free of charge.

If the interoffice correspondence is to be sealed, enclose the correspondence in a plain white envelope (NOT A BALL STATE LETTER ENVELOPE), seal it, and then put it into a properly addressed Campus Mail envelope.

MEMORANDUM

TO: Ball State Office Staff

FROM: Susan Smith, Training

DATE: April 12, 200-

SUBJECT: Use of Interoffice Memorandum

The use of the memorandum saves time. In addition, it allows written records of transactions between employees and departments of the university to be maintained with a minimum of cost.

ri

pc: Ralph Deaver

B. Filing and finding (information retrieval)

1. Filing techniques

- a. File each day's material. Do not let a large quantity of filing accumulate.
- b. When inserting papers into a file folder, place headings of papers to the left.
- c. Place papers in the folder in chronological order (the most recent date to the front).
- d. Repair papers that are torn or otherwise in need of repair.
- e. To place papers smoothly and evenly in the folder, lift the folder part way out or remove it from the file. If you have hanging files and there is extra room in the file drawer, you may not have to remove the folder.
- f. Attach related papers together with a staple. Do not allow staples to accumulate as new material is added. Remove old staples, and fasten the pages together with one staple.
- g. Work from the side of the file drawer for easier access.
- h. As the folder fills up, re-crease the scored edge at the bottom of the folder to allow it to hold more papers.
- i. When a folder becomes 3/4 inches thick, start a second folder for the same subject matter. Place the new folder in front of the old folder.
- j. To avoid accidents (cabinet tipping over), open one drawer at a time.
- k. When a folder is removed from the file, an "Out" card should be inserted in its place.
- 1. Always file folders behind the file guides.

2. Typing labels

When typing labels, begin typing the title about three spaces from the left and as near to the top of the label as possible. Do not center captions on labels. Capitalize the first letter of each word in the title.

3. Indexing and alphabetizing

a. Names are alphabetized with the last name first, followed by the first

name, and middle initial, if any. Apply the same rule to firms bearing the complete personal name.

<u>As Written</u> <u>As Filed</u>

Herbert Hoover Hoover, Herbert C. Hoover Hoover, Herbert C. J. Edgar Hoover Hoover, J. Edgar

b. Hyphenated words are treated as one unit.

As Written As Filed

Lukens Glass-Wax Store
Howard G. Mul-Key

Lukens Glass-Wax Store
Mul-Key, Howard G.

c. Prepositions, conjunctions, and articles are disregarded in the names of firms unless they are a distinctive part of the name. (Note: Endings such as "Co." are written out and used as indexing units.)

As Written As Filed

For Fun Bowling
Tavern on the Green
For Fun Bowling
Tavern (on the) Green

d. Disregard titles and academic degrees in alphabetizing, but place the title or degree after the name in parentheses.

As Written As Filed

Dr. Gideon Hyde Hyde, Gideon (Dr.) Gideon Hyde, Sr. Hyde, Gideon (Sr.)

e. Individual surnames with prefixes such as D', De, Del, Fitz, La, Le, M', Mac, O', St., Van, Van de, Von, and so on, are indexed as written and treated as one word. (Note: Alphabetize the prefix St. as though it was spelled out--Saint.)

As WrittenAs FiledJames D'AoustD'Aoust, JamesJohn E. DarlingDarling, John E.Edmund Saint ClairSaint Clair, EdmundSally van der Shalievan der Shalie, Sally

- f. Companies with identical names should be filed in alphabetical order of the names of the cities where they are located. If the cities are the same, file alphabetically by state name or street name.
- g. When a person cannot distinguish between the last and the given name, it should be filed as it occurs. Oriental names often fall into this classification. This type of name should be cross referenced.

As WrittenAs FiledMing-Ho-YuMing-Ho-YuChaing-LooChaing-Loo

h. Numerals are treated as if spelled out.

<u>As Written</u> <u>As Filed</u>

21 Club Twenty-one Club Sak's 5th Avenue Sak's Fifth Avenue

1710 Plaza Apartments Seventeen hundred ten Plaza

Apartments

i. The legal name of a married woman includes her own first name, her maiden surname, and her husband's surname. Her name may be cross referenced under her husband's name. "Mrs." is put in parentheses at the end of the name.

As Written As Filed

Mrs. Homer 0. Troy Troy, Helen Watson (Mrs.)

(Helen Watson)

Cross Reference: Troy, Homer, 0. (Mrs.)

j. Ignore the apostrophe and consider all letters in a possessive or a contraction.

As Written As Filed

Andrew's Delicatessen
Here's Music Company
Hereso Meat Company
Hereso Meat Company
Hereso Meat Company

4. Subject Filing

Because many files on campus are set up according to a subject system, the following rules should be followed when setting up subject files:

- a. The division names should be chosen carefully and should be significant terms in the particular office.
- b. All subject names chosen should be exclusive of others. They should be clearly descriptive so that an overlap of areas is prevented.
- c. All classes of material must be provided for in some division.

Although straight alphabetic files may be set up, they are suitable only for very small subject files. Generally, the encyclopedic subject file is preferred. In this system, the appropriate main subject headings are decided upon, and those are broken down into

many levels of subheadings, etc. A numeric coding system may be assigned to the final subject outline to facilitate filing and finding.

C. Public relations responsibilities

1. Telephone procedures

a. Incoming telephone calls

Keep a pen and "While You Were Out" pad next to your telephone to take messages. Use the telephone properly by holding the receiver close to your mouth and speaking clearly and distinctly into the receiver.

Answer the telephone by the **second** ring if at all possible. If you are speaking with someone at your desk, excuse yourself to answer the telephone. The visitor will understand the need to answer the telephone. If you must leave the office, arrange to have someone else answer your calls.

Make sure you have adjusted the volume on your telephone. You don't want to be yelling into the ear of your caller. In addition, make sure you speak at a moderate rate and not so fast that all of your words run together giving the impression that the telephone call is an interruption in your workday.

As a courtesy to the caller, you should identify yourself when answering the telephone, such as: "Mrs. Harper's office, Mrs. Jones speaking, How may I help you?" Another response might be: "History Department, Sally speaking, How may I help you?" You will need to check with your manager for the degree of formality with which you will answer the telephone.

If the person being called is not available, ask: "May someone else help you or may I give you _______'s voicemail?" If asked to take a message, repeat names, telephone numbers, and messages to the caller. The use of a printed form is an efficient means of recording all pertinent details of incoming calls. "While You Were Out" pads are available from Central Stores.

If the person being called has not arrived at his/her desk, especially in the morning, **never say**, "(Name) isn't in yet." You should respond, "She's away from her desk now." Then offer to take a message.

If the information requested will take some time to obtain, ask the caller if s/he prefers to wait or to be called back. If the person being called is on another line, explain this to the caller and ask, "Do you wish to wait, or shall I ask him/her to return your call?" If the party wishes to wait, you should check back on the line about every 45 seconds, if at all possible, to see if the caller wants to continue waiting.

Always terminate calls courteously and say "GOODBYE," not "ByeBye." Remember, the person answering the telephone is the university to a telephone caller; it is your responsibility to make a good impression on this person.

To improve public relations for your office, the person wanting to make the

call should actually dial the call; in other words, place your own calls. The person being called may find it rude to have to wait on the line while you tell your manager you have the party on the line.

In keeping with university policy, do not accept any COLLECT calls.

b. Outgoing telephone calls

(1) Local calls

In order to dial another office on campus, all that is required is a "5" and the four-digit extension number (5-0000). In order to dial off campus (not long distance), precede the seven digit number by dialing "9."

When the other party answers, the secretary should identify himself/herself. For example: "This is Mrs. Green of the Art Department at Ball State University. May I speak with Dr. please?" If the call is on campus, omit "at Ball State

Johnson, University."

If the person being called is not available and there is a message, volunteer complete information, including name, telephone number, or just the extension.

(2) Long distance calls

Several methods are available for placing long distance calls: SUVON, with authorization code, and personal credit card.

(a) SUVON

SUVON, the <u>State Universities Voice Network</u>, is used to call many Indiana cities and towns. Since SUVON is the least expensive long distance call for the university, refer to page 2 of the <u>Ball State University Directory</u> and see if your party can be reached--using these lines.

University telephone records indicate that the heaviest use of SUVON lines is around 10 a.m. and around 3 p.m. Avoidance of these times should improve your chance of a SUVON line being available for your <u>university business call</u>.

NOTE: DO NOT DIAL "9" BEFORE DIALING THE SUVON ACCESS CODE.

When calling inter-campuses of state universities, use the following information: After dialing your SUVON access code (281), listen for the dial tone. Then, dial 1 + Area Code = 7-digit number. One or more x's after a destination code indicate(s) the number of digits in the telephone number to be dialed. (For example: Assume the 7-digit telephone number for Indiana University is 855-4444. You should dial: 281-1-812-855-4444.)

See page 2 of the <u>Ball State University Directory</u> for additional universities and colleges with access through SUVON.

(b) Authorization Code

Use the 6-digit authorization code to make long distance calls to out-of-state numbers and to Indiana cities and towns not <u>served by SUVON</u>.

To make a call with authorization code:

Be sure you have the correct number of the party you are calling. Since there is a charge for directory assistance, you should keep a list of commonly called numbers or consult the telephone directories in Bracken Library, in the Alumni Association Office, or in the Lobby of the Student Center.

To place a call, enter: 9 + 1 + area code (including 765) + 7 - digit number of party being called. You will hear the dial tone beep three times, then enter the 6-digit confidential authorization code.

If all lines are busy after you enter the 6-digit authorization code, you will hear another 3 beeps and then a busy signal. Hang up the receiver. Your call has been put in trunk queuing. When a WATS line becomes available, the phone will ring with 3 short beeps (similar to automatic callback). Pick up the receiver and your call will go through. The computer will remember all of the numbers you previously entered.

In using this type of long distance, do <u>not let the phone of the party</u> you are calling ring more than 45 seconds, which is approximately 6 rings. If it rings longer than that or if the line is busy for 45 seconds, your department is charged for the call even though you did not reach your party.

After several rings or you find the line is busy, be sure to hold down the switch hook on the telephone set several seconds to insure the call has been disconnected. When you hear the regular dial tone, the line is available to place another call.

(c) Personal Credit Card

Dial 0 + Area Code + 7-digit number. The default long-distance carrier is AT&T. Check with your supervisor to verify if you even have this option on your telephone. In addition, your supervisor can assist you in placing this type of call.

2. Receptionist's Responsibilities

Your secretarial duties often include acting as a receptionist for the office. Remember to act as a public relations representative of Ball State University, the office, and the manager. It is <u>extremely</u> important that the first person a caller meets be polite and considerate. The employee who is rude, curt, condescending, or self-important can do unlimited damage to the prestige and image of the university.

a. Greeting the office visitor

Each person who comes into an office has a reason for being there. Meet the visitor with a smile and a friendly "May I help you?" (If you are talking on the telephone when the visitor enters, excuse yourself from the phone a moment and ask the visitor to have a seat or indicate in some way that you will be with him/her in a few minutes.) Learn the visitor's name, the person he/she wishes to see, and if he/she has an appointment. Remembering the names and faces of frequent visitors should be a goal of every secretary.

b. Screening callers

Ask your supervisor how visitors should be handled. Does he/she want to see every one who comes in? How should visitors be announced? Who should be admitted without an appointment? If a visitor should be directed to another office, help him/her by giving directions and/or a campus map if one is available.

Introduce the caller to your supervisor if the caller is a stranger. These introductions are a courtesy to both the caller and the supervisor. "Dr. Jones, this is Mr. Miller. He wishes to talk to you about a research paper" is an appropriate introduction.

c. Handling the unwanted caller

When faced with an irate visitor who insists upon talking with your supervisor, remain calm and be understanding. If your supervisor has told you he/she won't see anyone without an appointment, continue to offer to make an appointment for the caller. While this person is causing his/her own problem

at the moment by being rude, this is the same person who will complain that he/she was treated rudely by the secretary. Using courtesy and acting poised are effective in handling this type of person.

d. Interrupting a meeting or conference

Do not interrupt the supervisor when in the midst of a meeting or conference unless absolutely necessary. Do so as quietly and as unobtrusively as possible. Call him/her on the intercom, or write a note and present it without comment.

At times the supervisor may want help out of an awkward conference situation. A telephone call or note to the supervisor usually indicates to the visitor that his/her visit is running over the scheduled time.

3. Scheduling appointments

If the supervisor has extensive public contact, the task of scheduling appointments so that he/she still has time to complete daily work can become a phenomenal responsibility. Many supervisors prefer to delegate this responsibility to their secretaries. This minimizes the possibility of scheduling two appointments at the same time.

a. Information needed:

- (1) Name of person requesting the appointment
- (2) Purpose of conference
- (3) Time appointment is desired, including day and hour
- (4) Place where the conference is to be
- (5) Approximate length of time the conference will require.

b. Maintaining a calendar as an appointment book

Information concerning appointments for the day should be transferred to the supervisor's calendar the first thing each morning. This applies to both printed and electronic calendars. In addition, it may be necessary to make additions or changes as soon as they occur during the day.

Appointments or activities requiring advance preparation should be listed several days or weeks prior to the scheduled event. In this way, the supervisor will be reminded of the need to make necessary preparations.

c. Keeping appointments

If an appointment must be broken, it is necessary to notify the person as far ahead of time as possible.

The secretary never should talk to other employees about persons who call on the supervisor or the nature of their business. Remember, the word "secretary" is derived from the Latin word "secretum" meaning secret. Keeping matters that pertain to your office and to your supervisor confidential is part of your responsibility.

D. Office Security Regulations

1. Security within the office

One of the secretary's responsibilities is to make sure that certain procedures are carried out at the end of each day.

- a. Be sure important papers are placed in desks or file cabinets.
- b. Be sure that files and desks are locked if that is the procedure in your office.
- c. Be sure windows are closed, electrical equipment is off and/or unplugged, and the lights are off.
- d. Be sure doors are locked.

If difficulty is encountered when locking up or turning off electrical equipment, call the Department of Public Safety, 5-1111. Someone from that office will make arrangements to correct the situation. If additional security measures are to be followed within the office, they should be added to this <u>Handbook</u>.

2. Disturbances within the office

If a person should start disturbing the activities and work within the office, immediately contact the Department of Public Safety, 5-1111.

3. Emergency fire procedures

Should a fire be detected on the university campus that cannot be extinguished immediately and without danger to yourself, sound the alarm, call the Department of Public Safety, 5-1111, and report the location of the fire.

4. Vendors visiting offices

If a vendor enters your office and attempts to sell you a product or service that you did not request, call Purchasing, 5-1532, and request instructions on what procedures to follow.

5. Annual Security Report

This report can be accessed on the internet at www.bsu.edu/sa/securityrep. A paper copy of this report is available upon request from the Office of the Associate Vice President

for

Student Services/Dean of Students. (See Terms and Definitions Section of this <u>Handbook</u> for details on the content of this report.)

6. Additional security measures in this office: (INCLUDE LOCAL PROCEDURES)