PROFESSIONAL WRITING · STUDY GUIDE

Exam 5 Study Guide

This guide covers chapters 9 and 10. First, writing with other people: choosing a model, setting up before anyone drafts, merging without a Frankendraft, commenting usefully, and closing the document out. Then writing you can stand behind: sorting claims by the proof they need, honest numbers and language, credit and privacy, the sentences that create legal exposure, and how to correct an error. Work one chapter at a time. Read the "what to know" paragraphs, copy the tables out by hand, then try each worked case with the steps covered. Finish each chapter with its ten self-test items. The cram sheet at the end puts every list and rule in one place.

WHAT THIS GUIDE COVERS

- Chapter 9 · why team documents die, single, parallel and layered drafting, the writing charter, RACI, skeletons and style sheets, section briefs, one voice, the seam sweep, review levels, usable comments, receiving feedback, version control, sign-off, credit and AI disclosure.
- Chapter 10 · facts, estimates, inferences, opinions and predictions, lateral reading and SIFT, honest numbers, spin and omission, calibrated language, plagiarism, patchwriting, copyright and fair use, confidentiality and de-identification, defamation, contracts, warranties and spoliation, corrections, escalation and apology.

CHAPTER 9

Collaborative and Team Writing

Read it in full: **Chapter 9 in the textbook**. Practice it in the lab: **The One-Page Charter** and **The Comment Clinic**.

What to know

Almost nothing that matters at work is written alone. Team documents die in four predictable ways. **No owner**: nobody whose job it is to notice section 3 never arrived. Ownership is not seniority or authorship; it is the one named person who holds the file, tracks who owes what, and closes disputes. **The Frankendraft**: sections in clashing registers because nobody agreed on the

reader. **Silent disagreement**: a hedge such as "consideration should be given to" that is really an unresolved argument. **Late-stage reversal**: a senior reviewer objects to the premise on day twenty; get that objection on day two.

Three models cover most work. **Single drafter**: one person writes all prose from others' material; consistent, but a bottleneck. **Parallel drafting**: owned sections merged; fast across spread expertise, prone to Frankendrafts. **Layered drafting**: the file moves through fixed passes (content, compliance, plain language, design); safest for regulated documents, slow. Live co-writing is a hybrid for short high-stakes text, timeboxed to about 45 minutes. Choose with four questions: how many people hold unique knowledge, how long the deliverable is (below about 1,500 words splitting costs more than it saves), whether it is regulated or safety-critical, and whether someone can kill it (they review the outline). A classic observation from software engineering applies: adding people to a late project makes it later.

Write a one-page **writing charter** first: purpose, primary and secondary audience, deliverable and length, out of scope, owner, contributors and sections, reviewers and their lanes, decision rule, source of truth, and definition of done. Circulate it with "Reply by Thursday noon; silence means agreement." Use **RACI**: responsible (does it), accountable (exactly one person), consulted (asked before), informed (told after). Give reviewers lanes. Agree a **skeleton** (headings, one-line descriptions, word targets, owners) and a **style sheet** of ten to twenty local decisions.

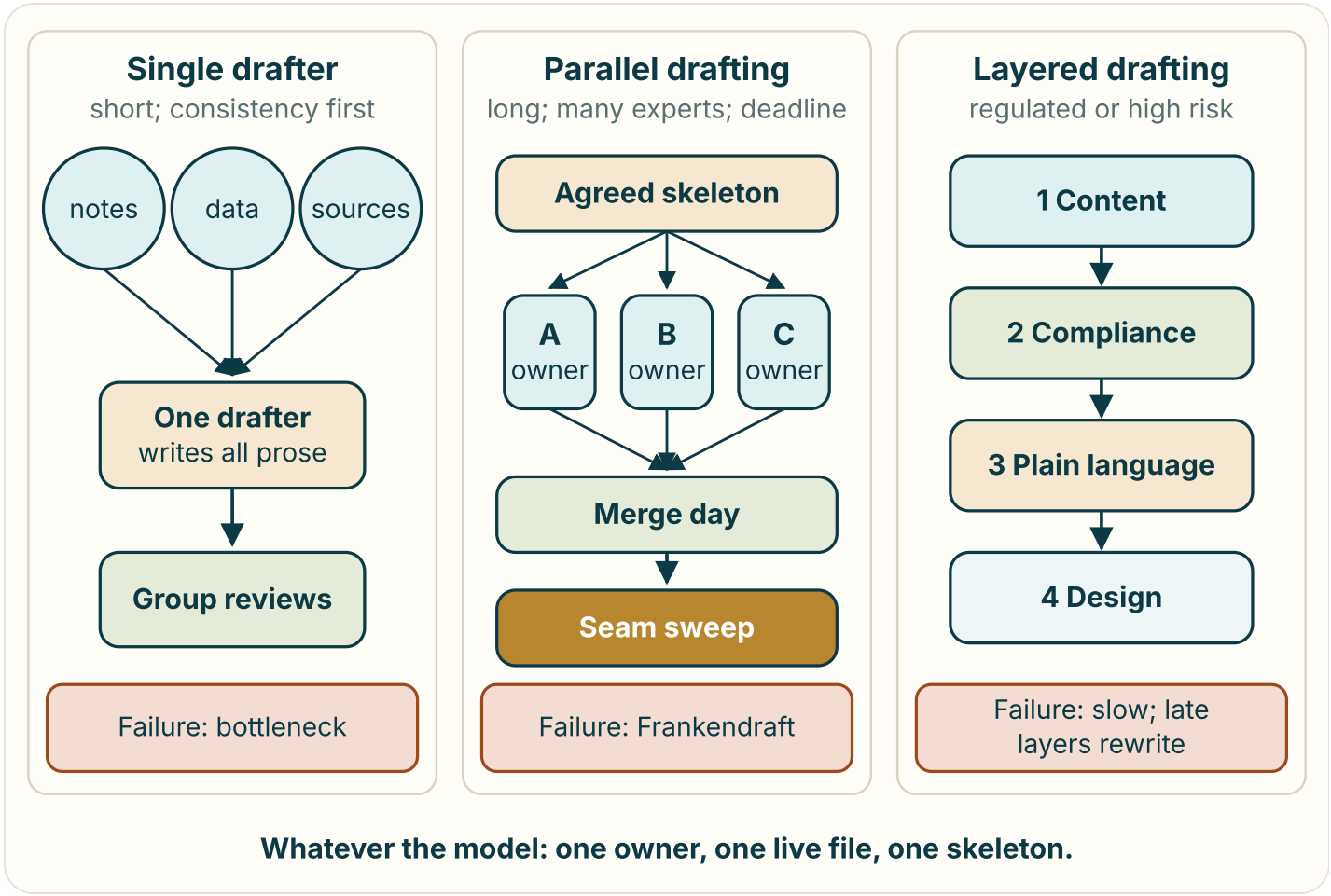
A **section brief** states the section, owner, length, reader, the section's job in behavioral terms, what to include, what to leave out, the source of truth, the due date and that the style sheet applies. One voice means consistent decisions, not one person's soul: one term for the person, one obligation vocabulary, sentence length in the same band. The owner edits the merged file and says so in the charter. Run a **seam sweep** reading only the end of each section and the start of the next for contradiction, redundancy and register shift, plus orphaned transitions and detail mismatch. Freeze the skeleton before merge day.

Review in three levels, never mixed: **substantive review** (does it work), then **line editing** (sentences), then **proofreading** (typos, numbers, cross-references). Label the round. A usable comment names the problem, the location and a candidate fix, marks blocking versus optional, and flags patterns once. Receiving feedback: triage first into accept, accept with modification,

decline with reason, needs a decision. Decline with a reason tied to a shared standard. When reviewers conflict, do not split the difference; send it to the owner with a date. Close the loop by telling reviewers what happened to their comments.

Keep one live file whose location is in the charter; attachments are read-only snapshots. Name versions so they sort and show status (falls-policy_v1.0_2026-04-18_approved.docx); "final" is not a version. Accept tracked changes section by section. Record sign-off in the document: who approved which version, on what date, for what scope. For credit, the ICMJE criteria require all four: substantial contribution, drafting or critical revision, final approval and accountability. Avoid **guest** and **ghost authorship**. For generative AI, agree a norm in the charter: the tool cannot be an author, a human answers for every sentence, use beyond routine tools is disclosed as required, no confidential data goes into unapproved tools, and every fact is verified.

> **LOCK THESE IN**
>
> - Four deaths: no owner, Frankendraft, silent disagreement, late-stage reversal.
> - Single drafter for consistency; parallel for speed across experts; layered for regulated work.
> - Under about 1,500 words, do not split the drafting.
> - One-page charter with a reply-by date: silence becomes a recorded decision.
> - RACI: exactly one accountable person.
> - Section brief: reader, length, job, include, exclude, source, due date.
> - Seam sweep: contradiction, redundancy, register shift.
> - Review order: substantive, line edit, proofread. Comment = problem + location + fix.



Three ways to write together. Each model has a known failure mode. Pick the model on purpose and plan for its failure instead of being surprised by it.

Key terms and comparisons

Term	What it means	Note
Document owner	Holds the file, tracks who owes what, closes disputes	Not the same as the most senior person
RACI	Responsible, accountable, consulted, informed	Accountable is exactly one person
Skeleton	Headings, descriptions, word targets, owners	Frozen before merge
Style sheet	10 to 20 project decisions	Turns a recurring argument into a lookup
Section brief	A written assignment for one section	States the section's job in behavioral terms
Seam	Where one author's section meets the next	Where defects concentrate
Blocking comment	Must be resolved before moving on	Label it; separate from optional
Sign-off	Who approved which version, when, for what	Recorded in the document
Guest / ghost author	Named without contributing / omitted despite contributing	Both distort the record

The three models

Model	Best when	Known failure	Owner's main job
Single drafter	Short; consistency matters most	Bottleneck	Protect the drafter; chase inputs
Parallel drafting	Long; expertise spread; hard deadline	Frankendraft	Skeleton, style sheet, seam sweep
Layered drafting	Regulated or high risk	Slow; late layers rewrite early ones	Set the order; cap each holder's time
Live co-writing	Short, high-stakes text	Loudest voice wins; no record	Timebox to 45 minutes; log decisions

Version control habits

Risky habit	Safer practice
Emailing drafts for edits	Link to one live file; attachments read-only
Naming files "final"	Version, ISO date, status: v1.0_2026-04-18_approved
Accept all changes	Accept by section, reading each change
Silent overwrite	Change it and leave a one-line comment
Decisions in chat	Resolved comments or a decision log in the document
No frozen copy	Locked PDF at sign-off; open v1.1 for later edits

Worked cases

WORKED CASE 1 · CHOOSING A MODEL

A unit needs a falls-prevention policy in three weeks. Four experts hold different pieces, the document is about 2,200 words, it is regulated, and the CNO can kill it. Design the collaboration.

STEP 1 · UNIQUE KNOWLEDGE

Four people hold knowledge nobody else has, so parallel drafting for the evidence and the four annexes saves time.

STEP 2 · LENGTH

About 2,200 words is above the roughly 1,500-word line, so splitting pays. But one drafter writes the policy statement itself so the mandatory language is consistent.

STEP 3 · REGULATION

Add one non-negotiable layered compliance pass by risk management at the end.

STEP 4 · THE VETO

Give the CNO a fifteen-minute outline review in week one, not the finished prose.

CHECK THE OPPOSITE CASE

Four people, three weeks, 1,200 words: below the line, so use a single drafter and have the others supply material and review.

WORKED CASE 2 · COUNTING COORDINATION LINKS

Why does adding writers slow a team down? Count the pairwise links for teams of 4 and 8.

STEP 1 · THE PAIR COUNT

Each pair of people is one link to keep in sync: $n \times (n - 1) \div 2$.

STEP 2 · FOUR PEOPLE

$4 \times 3 \div 2 =$ **6** links.

STEP 3 · EIGHT PEOPLE

$8 \times 7 \div 2 =$ **28** links.

THE LESSON

Doubling the hands more than quadruples the links. Split the work aggressively, but keep coordination narrow: one owner, one file, one skeleton.

WORKED CASE 3 · REPAIRING A SEAM

Two merged sections say documentation is due "within thirty (30) minutes" and "prior to the end of the shift". Fix it.

STEP 1 · DO NOT AVERAGE OR DELETE

A contradiction at a seam usually reflects a real operational disagreement.

STEP 2 · ESCALATE TO THE OWNER

Name it in one sentence and ask the owner for a decision by a date.

STEP 3 · WRITE THE RESOLVED RULE WITH ITS EXCEPTION

"Document the fall in the EHR within 30 minutes. If the patient is unstable, stabilize first and document as soon as the patient is safe: never later than the end of your shift."

STEP 4 · APPLY THE STYLE SHEET

Numerals for times, never doubled: 30 minutes, not thirty (30) minutes.

WORKED CASE 4 · TURNING A STALLED COMMENT INTO A USABLE ONE

A reviewer writes "Legal won't approve this" next to "This program guarantees patient safety." Rewrite the comment.

STEP 1 · NAME THE PROBLEM

"Guarantees patient safety" states an outcome we cannot promise.

STEP 2 · MARK THE SEVERITY

Blocking.

STEP 3 · OFFER A FIX

Suggest "reduces the risk of falls."

STEP 4 · GIVE THE BASIS

"Basis: our standard language for outcome claims." A rule with a replacement can be acted on in ten seconds; a prediction cannot.

TRAPS PEOPLE FALL INTO

- **Assuming the senior person is the owner.** The owner is whoever holds the file and chases inputs, usually closest to the work.
- **Splitting a short document.** Below about 1,500 words the merge costs more than drafting saves.
- **A three-page charter.** Nobody reads it, and it creates the illusion of alignment.
- **"Can you write the medication part?"** That is a wish. Write a brief with reader, length, job, include, exclude and due date.
- **Smoothing everything after merge.** Fix the seams and repeated inconsistencies first; most of the mismatch lives there.
- **Proofreading before structure.** Polishing a paragraph that substantive review will delete wastes scarce attention.
- **Splitting the difference.** Two conflicting reviewers get a decision from the owner, not a hedge.
- **Approval only in email.** It disappears when someone changes employers. Record it in the document.

Chapter 9 self-test · ten items

1. What is a document owner, according to the chapter?

A. The most senior person on the distribution list for the project
B. The one person who holds the file, chases inputs and closes disputes
C. Whoever wrote the largest share of the words in the final draft
D. Every contributor equally, since all of them share the work

B. The one person who holds the file, chases inputs and closes disputes Ownership is not seniority and not authorship. It is an operational role.

2. "Consideration should be given to the possible implementation of hourly rounding where feasible." What does this sentence most likely signal?

A. An unresolved disagreement disguised as caution
B. Careful writing suited to a regulated document
C. A proofreading error that a spell check missed
D. A correct use of the passive voice in a methods part

A. An unresolved disagreement disguised as caution Surface the disagreement, let the owner decide, then write the decision plainly.

3. Four people must produce a 1,200-word policy update. Which model fits?

A. Parallel drafting, with each of the four people writing one quarter
B. Layered drafting with four passes, one per person in turn
C. Live co-writing for the whole document over several days
D. A single drafter, with the others supplying material and reviewing

D. A single drafter, with the others supplying material and reviewing Below about 1,500 words the merge and seam repair cost more than splitting saves.

4. In RACI, how many people are accountable for a piece of work?

A. At least two
B. All of them
C. Exactly one
D. None needed

C. Exactly one Two accountable people is the same as none.

5. Why circulate a charter with "silence means agreement" and a reply-by date?

A. It discourages anyone from raising any objections about the scope
B. It lets the owner skip asking the senior reviewer for input
C. It guarantees that every reviewer will read the full charter
D. It turns non-response into a recorded decision you can point to

D. It turns non-response into a recorded decision you can point to Passive non-response otherwise looks like agreement until day twenty.

6. Which line in a section brief is called the single most useful one?

A. The due date and the exact time it is due
B. The job of the section, in behavioral terms
C. The name of the person who owns the section
D. The citation style the section should follow

B. The job of the section, in behavioral terms Stating what the reader must be able to do sets content and register at once.

7. What three defects does a seam sweep mainly look for?

A. Contradiction, redundancy and register shift
B. Typos, broken links and missing page numbers
C. Passive voice, jargon and long sentences
D. Weak titles, missing alt text and bad charts

A. Contradiction, redundancy and register shift Orphaned transitions and detail mismatch are worth checking too, but those three concentrate at seams.

8. Which sequence of review rounds does the chapter recommend?

A. Proofreading, then line editing, then substantive review
B. Line edit first, then substantive review, then proofread
C. Substantive review, then line editing, then proofreading
D. All three at once, so the draft only circulates one time

C. Substantive review, then line editing, then proofreading Mixing them wastes attention on text that structural review is about to cut.

9. Which comment can a writer act on without a follow-up conversation?

A. This whole section just does not work very well for me at all, sorry
B. Blocking: section 4 omits the two-drug rule in the charter; add it?
C. Awkward phrasing in a few places; maybe take another look at it
D. Great work on this one!! Really enjoyed reading the entire thing

B. Blocking: section 4 omits the two-drug rule in the charter; add it? A usable comment gives a problem, a location and a candidate fix, and marks its severity.

10. Under the ICMJE criteria, what makes someone an author?

A. All four: contribution, drafting or revision, approval, accountability
B. Any one of: contribution, drafting, final approval or accountability
C. Seniority in the department plus approval of the final version
D. Providing data or formatting help at any stage of the project

A. All four: contribution, drafting or revision, approval, accountability All four are required. People who supplied data or formatting are acknowledged, not named as authors.

CHAPTER 10

Accuracy, Ethics and Legal Risk

Read it in full: **Chapter 10 in the textbook**. Practice it in the lab: **The Proof Ledger** and **The Correction Ladder**.

What to know

Every document you sign quietly promises that you checked. Most failures are of verification, proportion or nerve, not style. The legal material in the chapter is U.S.-centered, general and not legal advice; rules vary by state, sector and employer.

Sort statements by the proof they need. A **verifiable fact** can be confirmed from a record. An **estimate** comes from a method, so the method travels with it. An **inference** is your leap from facts; show it. An **opinion** is a judgment; state the criteria and who holds it. A **prediction** needs a basis, a horizon and a confidence level. The test: if challenged tomorrow, what would I show? Check claims with **lateral reading** (studies from the Stanford History Education Group found skilled fact-checkers leave the page) and Mike Caulfield's **SIFT**: Stop, Investigate the source, Find better coverage, Trace claims to the original. A citation is not a check.

Numbers are claims. Give denominators, separate **percentage points** from **relative change** (2.0% to 1.0% is a 1.0-point absolute and 50% relative reduction), do not mix counts with rates, avoid false precision, and date the number ("census was 28 at 0700 on 14 March").

Honesty goes beyond literal truth. A half-true sentence is accurate and deceptive, usually by a missing comparison, timeframe or denominator. The test: what would a fair-minded reader assume, and is it true? Omission is judged by **materiality**. Spin moves include the agentless passive, nominalization, euphemism, weasel attribution, a cherry-picked window and overclaiming cause. **Calibrated language** matches verb strength to evidence (causes, is associated with, may); hedge specifically with a named limitation, not vague softeners. The research on how hedging reads is mixed.

Credit, permission and original expression are three duties. **Plagiarism** is presenting others' words or ideas as yours; attribution cures it but is not a license. **Copyright infringement** violates the owner's rights. **Patchwriting** (Rebecca Moore Howard's term) keeps a source's structure with synonyms and is usually plagiarism even when cited; close the source and write from memory. **Fair use** is a four-factor test (purpose, nature, amount, market effect) with no magic word count. Creative Commons: BY requires attribution, NC restricts commercial use, SA requires sharing adaptations alike.

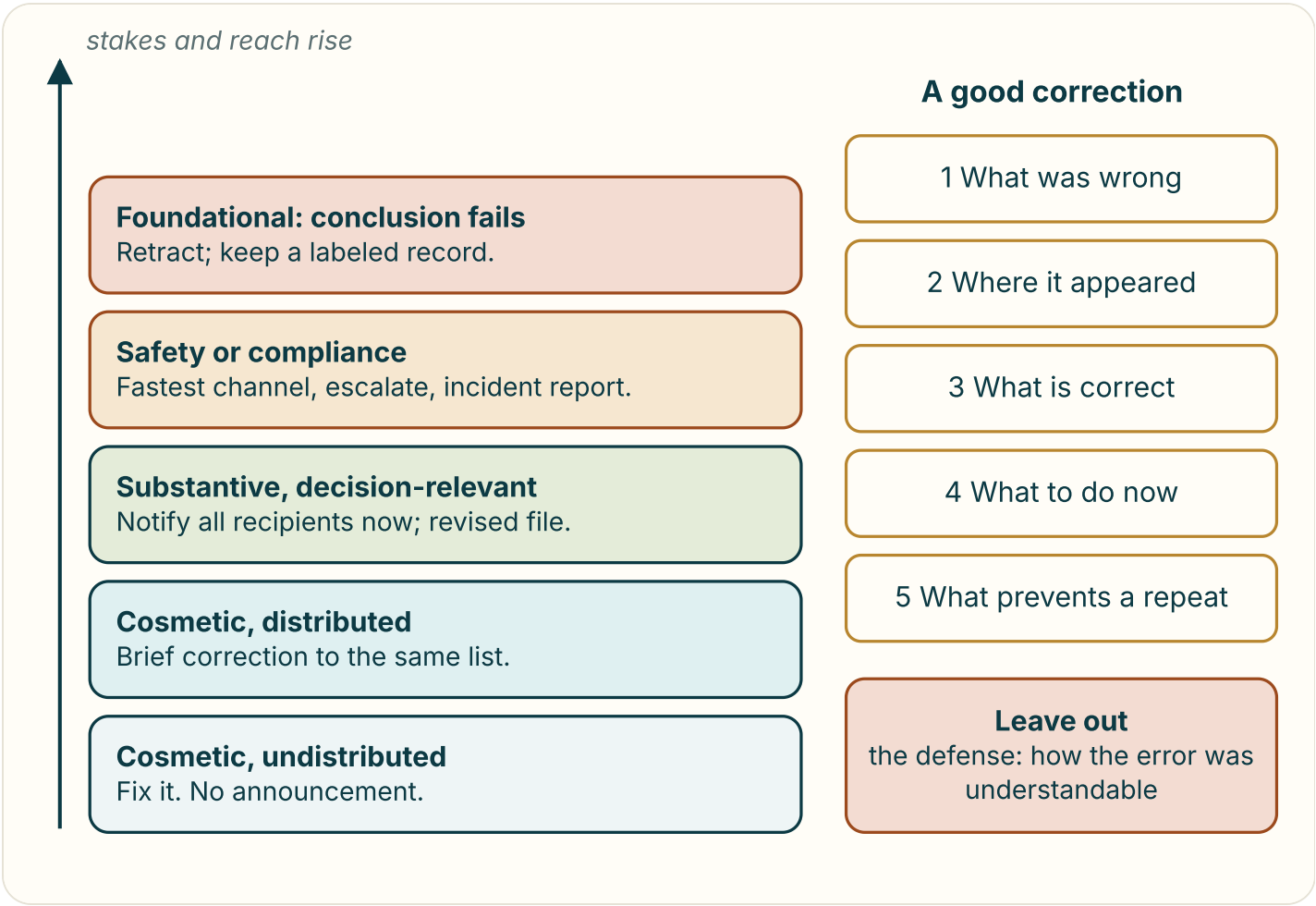
Confidential information includes PHI (HIPAA Privacy Rule), education records (FERPA), personal data (state laws, GDPR where it applies) and proprietary information (contracts). HIPAA **safe-harbor de-identification** removes eighteen categories of identifier, including all date elements except year and geographic units smaller than a state; ages over 89 are aggregated. Apply **minimum necessary**. "No names" is not de-identification: ask whether a neighbor could tell who it is. Check recipients, read to the bottom before forwarding, keep regulated data out of unmanaged channels, redact with tools that remove text, and keep identifiers out of subject lines.

Defamation needs a false statement of fact, communicated to a third party, with the required fault, causing harm; truth is a defense. Public officials and figures must show **actual malice** (New York Times Co. v. Sullivan, 1964; Curtis Publishing Co. v. Butts). Milkovich v. Lorain Journal Co. (1990) declined a blanket opinion privilege, so describe behavior and dates. Email can form a contract (E-SIGN, UETA). Under UCC Article 2 a factual affirmation can create an **express warranty**; **puffery** generally does not. The FTC expects substantiation. Policies can set standards you are measured against. After a **litigation hold**, destroying material is **spoliation**; follow retention schedules both ways.

Match corrections to reach and stakes. A good correction states what was wrong, where, what is correct, what to do now and what prevents recurrence, with no defense. Tell a colleague privately first about their error. Raise concerns with observation, standard, gap and ask, through the designated channels; whistleblower protections vary. Apologize by naming what happened and what you are doing, without explaining why it was reasonable. Apology laws vary and their effect is contested. Disclosure of a conflict is a floor, not a cure (Cain, Loewenstein and Moore); recuse when it is serious.

LOCK THESE IN

- Fact, estimate, inference, opinion, prediction: each needs its own proof.
- SIFT: Stop, Investigate the source, Find better coverage, Trace to the original.
- Give both frames: percentage points and relative change; date every number.
- A fair-minded reader's impression must match your evidence; omit nothing material.
- Credit, permission and original expression are separate duties; patchwriting is plagiarism.
- Safe harbor removes 18 identifiers; minimum necessary; could a neighbor tell?
- Describe behavior and dates, not character; "in my opinion" is not a shield.
- Correction: wrong, where, correct, do now, prevention. No defense.



Match the response to the error. Reach and stakes decide the rung. Every correction above the bottom rung carries the same five parts and leaves out the defense.

Key terms and comparisons

Statement type	What proves it	Honest version (example)
Verifiable fact	A record, receipt, log or primary document	14 of 62 staff (23%) left January to June, per HR
Estimate	A method plus assumptions and range	$34,000 to $46,000, assuming current volume
Inference	Facts plus the reasoning shown	9 of 14 exit interviews named the schedule
Opinion	Stated criteria and who holds it	Weighing fatigue risk, I recommend against
Prediction	Basis, horizon, confidence	Over two quarters; moderately confident

Credit and permission

Situation	What you owe
Distinctive wording you keep	Quotation marks plus a citation
Someone else's idea in your words	A citation
Synonym-swapped source sentence	Rewrite from memory; citation alone does not fix it
Uncontested common knowledge	Nothing, if truly common in your field
A figure or photo from another work	Permission or a license, plus attribution
AI-drafted text	What your employer or instructor requires, plus verification

Everyday legal exposure

Risky sentence	Exposure	Safer direction
She was let go because she was stealing.	Defamation if unproven	Dates, title, "following an internal review"
Yes, we can do that: sounds good.	May read as contract acceptance	Nothing is agreed until a signed PO
Our system will eliminate errors.	Express warranty; no substantiation	Pilot results with a range
Staff will always double-check.	Absolute standard	Required check, audited monthly
Delete this thread when done.	Potential spoliation	Do not write it; ask records management

Worked cases

WORKED CASE 1 · MAKING A NUMBER HONEST

A memo says "Overtime is out of control." Overtime was 310 hours in Q1 and 498 in Q2, against a budget ceiling of 350 a quarter. Rewrite it.

STEP 1 · COMPUTE THE CHANGE

(498 − 310) ÷ 310 = 0.606, so **61%**.

STEP 2 · COMPARE TO THE STANDARD

498 is 148 hours over the 350 ceiling.

STEP 3 · WRITE IT

"Overtime hours rose from 310 in Q1 to 498 in Q2, a 61% increase, against a budgeted ceiling of 350 per quarter."

STEP 4 · IF THE 498 TURNS OUT WRONG

The chapter's correction: the real figure was 398, so (398 − 310) ÷ 310 = 0.284, or **28%**. The correction states both numbers and the fix.

WORKED CASE 2 · BOTH FRAMES FOR A RATE

An infection rate fell from 1.8 to 0.9 per 1,000 line-days after a protocol launched, while other changes also occurred. Report it.

STEP 1 · ABSOLUTE CHANGE

1.8 − 0.9 = **0.9 per 1,000 line-days**.

STEP 2 · RELATIVE CHANGE

0.9 ÷ 1.8 = **50%**.

STEP 3 · CALIBRATE THE CAUSE

Other changes happened in the same period, so do not write "cut infections in half".

STEP 4 · WRITE IT

"The infection rate fell from 1.8 to 0.9 per 1,000 line-days after the protocol launched: a 0.9 absolute and 50% relative reduction. Other changes occurred in the same period, so causation is not established."

WORKED CASE 3 · DE-IDENTIFYING A VIGNETTE

"On 3/14 I cared for a 78 y/o male from Millbrook admitted to 4-West after a fall at his daughter's wedding. He is a retired fire chief, has a pacemaker, and his wife is a nurse on our own unit."

STEP 1 · LIST THE IDENTIFIERS

Full date; specific age; town; unit; a public event; a near-unique occupation; a relationship to staff.

STEP 2 · DECIDE WHAT THE TEACHING NEEDS

An older adult, a fall, an implanted device. Nothing else.

STEP 3 · GENERALIZE OR CUT

Date out; age to "in their seventies"; town, unit, occupation and relationship deleted; wedding to "a family event".

STEP 4 · REWRITE AND TEST

"I cared for an adult in their seventies admitted after a mechanical fall at a family event. The patient has an implanted cardiac device, which shaped our approach to imaging and telemetry." Could a neighbor tell who it is? No.

WORKED CASE 4 · RAISING A CONCERN IN WRITING

Kim processed invoices 4471 and 4488 on 14 and 21 June, each with a $2,400 "consulting" line and no statement of work. Policy section 4.2 requires a signed SOW first. Write the note.

STEP 1 · OBSERVATION

Dates, invoice numbers and the line item, with no adjectives.

STEP 2 · STANDARD

"Our purchasing policy, section 4.2, requires a signed SOW before payment of consulting charges."

STEP 3 · GAP AND ACTION TAKEN

"I have held both invoices."

STEP 4 · ASK

"Could you confirm whether an SOW exists, or advise how you would like me to proceed?" No accusation, nothing to dismiss.

TRAPS PEOPLE FALL INTO

- **Treating a citation as a check.** A formatted reference proves you found something, not that it says what you claim.
- **Relative change alone.** "Cut in half" without the absolute rate inflates the benefit.
- **"No safety concerns were reported."** True only if someone asked. Say whether anyone did.
- **Vague hedges.** "Somewhat preliminary" adds fog. Name the limitation.
- **"I cited it."** Citation answers whose idea it is, not whether you may copy it or whether you wrote it.
- **"No names" as de-identification.** Combinations of details identify people. Ask whether a neighbor could tell.
- **A black box over PDF text.** The text often stays underneath. Use a tool that removes it, then search the output.
- **A defended correction.** Explaining why the error was understandable moves attention to your feelings.

Chapter 10 self-test · ten items

1. "We project $34,000 to $46,000 in savings, assuming current volume." What kind of statement is this?

A. A verifiable fact, confirmed from a record
B. An opinion, based on the writer's priorities
C. An inference, drawn from exit interviews
D. An estimate, with its method and assumptions

D. An estimate, with its method and assumptions An estimate is only as good as its method, so the method travels with it.

2. What does the T in SIFT stand for?

A. Trust the most recent source
B. Trace claims to the original
C. Test the claim with a survey
D. Translate the claim plainly

B. Trace claims to the original Stop, Investigate the source, Find better coverage, Trace claims to the original.

3. An adverse event rate falls from 2.0% to 1.0%. Which report gives both honest frames?

A. A 1.0 percentage-point absolute and 50% relative reduction
B. A 50 percentage-point absolute and 1.0% relative reduction
C. A 1.0% absolute and 1.0 percentage-point relative reduction
D. A 2.0 percentage-point absolute and 100% relative reduction

A. A 1.0 percentage-point absolute and 50% relative reduction Readers who see only the relative figure tend to overestimate the benefit.

4. What is patchwriting?

A. Quoting a source word for word, with quotation marks and a citation
B. Combining notes from several sources into one new argument
C. Keeping a source's sentence structure while swapping in synonyms
D. Correcting a published document with a dated addendum note

C. Keeping a source's sentence structure while swapping in synonyms It is generally treated as plagiarism even when cited, because the expression is borrowed.

5. Which statement about fair use is accurate?

A. It allows any quotation under 300 words
B. It applies automatically once you cite it
C. It covers anything used for a workplace task
D. It is a four-factor test weighed case by case

D. It is a four-factor test weighed case by case Purpose, nature of the work, amount used and market effect are weighed together. There is no magic word count.

6. Under HIPAA safe harbor, which date element may remain?

A. The year
B. The month
C. The day
D. The full date

A. The year All elements of dates other than year must be removed.

7. Does writing "in my opinion" before an accusation protect the writer from a defamation claim?

A. Yes; opinions are always protected by the First Amendment
B. Yes, as long as the statement is made only in a private email
C. No; what matters is whether it implies provably false facts
D. No, because opinions are always treated as false facts

C. No; what matters is whether it implies provably false facts Milkovich v. Lorain Journal Co. (1990) declined a blanket opinion privilege.

8. Which sales claim is most likely to create an express warranty?

A. Best-in-class support from our very friendly service team
B. Guaranteed four-hour response, twenty-four hours a day
C. We think you will love working with our company
D. An industry leader trusted by customers everywhere

B. Guaranteed four-hour response, twenty-four hours a day A specific affirmation of fact can become part of the bargain. Vague enthusiasm is puffery.

9. A litigation hold arrives and your mailbox auto-deletes mail older than a year. What must you do?

A. Let the rule run, since it was set up before the hold
B. Delete anything that might look bad before it is collected
C. Forward everything to your personal email to keep a copy
D. Suspend the auto-delete within the hold's scope at once

D. Suspend the auto-delete within the hold's scope at once Loss of material after the duty to preserve attaches is spoliation and can bring sanctions.

10. What does a good correction leave out?

A. A defense of why the error was understandable
B. The correct figure and where the error appeared
C. What the reader should do now with the document
D. What was changed to prevent a recurrence

A. A defense of why the error was understandable The defense moves the reader's attention from the fact to your feelings about it.

ONE PAGE

Cram sheet

Everything from chapters 9 and 10 in one place. Cover the right column and see if you can rebuild each row.

Lists to know

List	Items
Four deaths of team documents	No owner, Frankendraft, silent disagreement, late-stage reversal
Collaboration models	Single drafter, parallel, layered (plus live co-writing)
Charter fields	Purpose, audiences, deliverable, out of scope, owner, sections, reviewer lanes, decision rule, source of truth, done
RACI	Responsible, accountable (one), consulted, informed
Seam defects	Contradiction, redundancy, register shift (plus orphaned transition, detail mismatch)
Review levels	Substantive, line edit, proofread
Statement types	Fact, estimate, inference, opinion, prediction
SIFT	Stop, Investigate, Find better coverage, Trace
Fair use factors	Purpose, nature, amount, market effect
Correction parts	Wrong, where, correct, do now, prevention

Numbers and names

Item	Value	Note
Split threshold	About 1,500 words	Below it, use a single drafter
Pairwise links	n(n − 1) ÷ 2	4 people = 6; 8 people = 28
Live co-writing	About 45 minutes	Capture decisions in a comment
Safe harbor	18 identifier categories	Year may remain; ages over 89 aggregated
Overtime example	310 to 498 = 61%; corrected 398 = 28%	Ceiling 350 a quarter
Actual malice	NYT v. Sullivan (1964); Curtis v. Butts	Public officials, then public figures
Opinion	Milkovich v. Lorain Journal (1990)	No blanket opinion privilege
E-records	E-SIGN Act, UETA	Email can form a contract

Rules that are not formulas

Topic	The rule
Ownership	One named owner, one live file, one skeleton.
Comments	Problem, location, candidate fix; blocking or optional.
Conflicts	Do not split the difference; the owner decides by a date.
Sign-off	Who, which version, what date, what scope, in the document.
AI assistance	Not an author; a human answers for every sentence; disclose and verify.
Honesty	The fair reader's impression matches the evidence.
Privacy	Minimum necessary; could a neighbor tell?
Records	Follow retention both ways; never alter after a hold.

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