PROFESSIONAL WRITING · STUDY GUIDE

Final Exam Study Guide

The final covers all fourteen chapters. Each chapter here is shorter than in the exam guides: three paragraphs of what to know, the points to lock in, its diagram, one table, one worked case, the traps and six new self-test items. If a chapter feels shaky, go back to its exam guide for the full treatment. The long cram sheet at the end pulls every pattern, list and number in the course into one place. Work two chapters a day and the whole course fits into a week.

WHAT THIS GUIDE COVERS

- Foundations: chapters 1 to 4 (audience and purpose; email; clarity and tone; document design).
- Documents that carry decisions: chapters 5 and 6 (memos, letters and short reports; long reports and proposals).
- Documents people use: chapters 7 and 8 (instructions, procedures and policy; data and visual evidence).
- Working with others and standing behind your words: chapters 9 and 10 (team writing; accuracy, ethics and legal risk).
- You in public: chapters 11 and 12 (resumes and cover letters; digital and social communication).
- Specialized practice: chapters 13 and 14 (healthcare documentation and handoff; editing and quality control).
- Every chapter carries what to know, a diagram, a table, a worked case, the traps and a six-item self-test, and the cram sheet holds everything.

CHAPTER 1

Writing at Work: Audience, Purpose and Context

Read it in full: **Chapter 1 in the textbook**. Practice it in the lab: **Purpose Forge** and **The Pre-Send Rubric**.

What to know

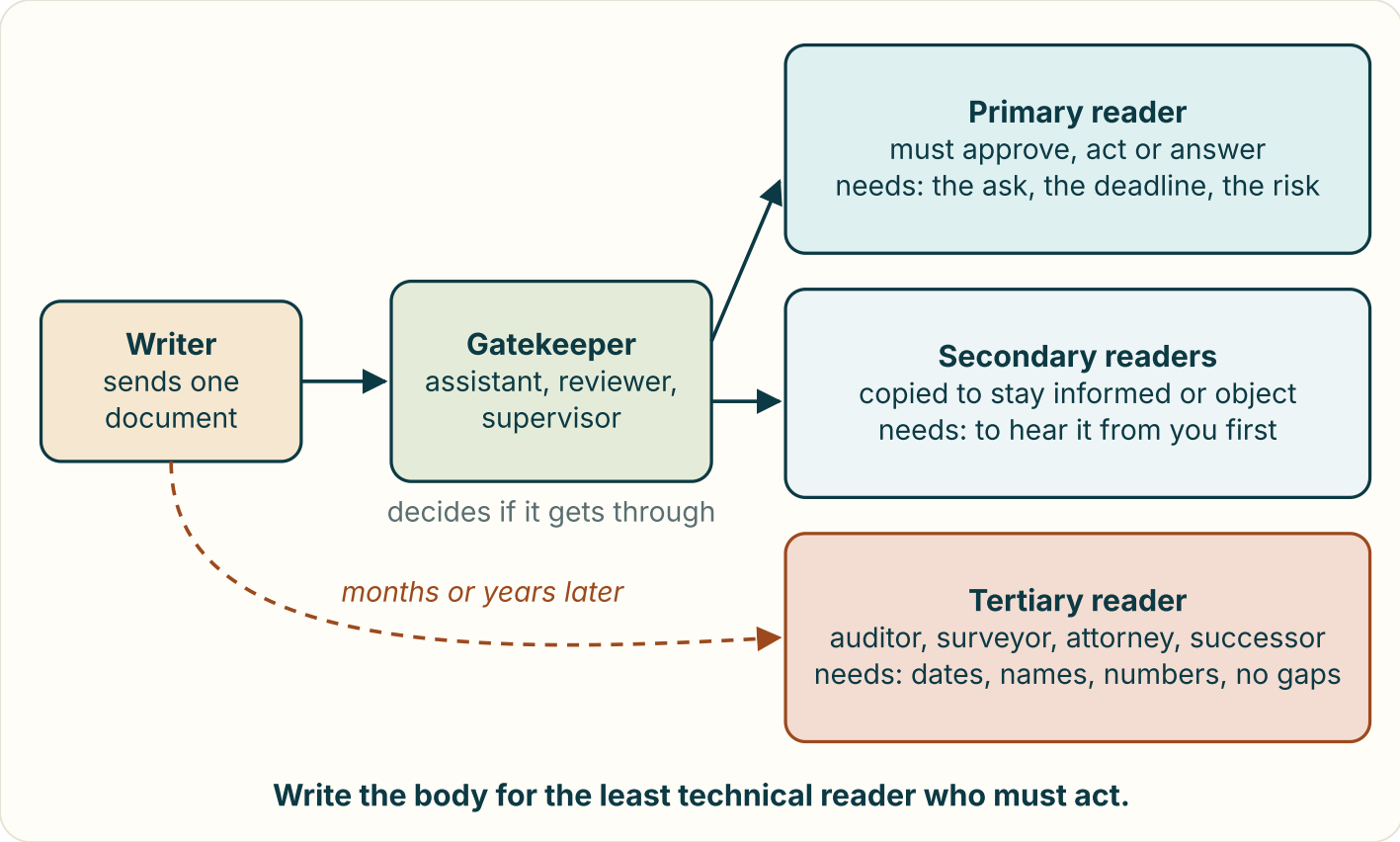
Workplace writing is judged by what the reader can do after a few seconds, not by visible effort. An essay builds to its point for a reader paid to finish; a work document leads with the conclusion for a reader with ninety unread messages. That is **bottom line up front**: the first two sentences

say what this is about, what you want and by when. The action request fills four slots: I need [who] to [do what] by [when] so that [consequence].

One message reaches four readers: the **primary** reader who acts, the **gatekeeper** who controls access, **secondary** readers who are copied, and the **tertiary** reader who opens it years later. Write the body for the least technical reader who must act and push depth into an attachment. Adaptation changes emphasis, vocabulary and depth, never the facts.

A purpose is a verb, not a topic: after reading this, [reader] will [action] by [date], because [reason]. Documents inform, request, persuade or record; keep one primary job and one ask. Choose the channel on complexity, speed, emotional load and the need for a record; Bitzer and Vatz disagree about the rhetorical situation, but both see outside forces shaping the writing. Treat everything as a discoverable document of record, run PACT before drafting and the pre-send rubric before sending.

> **LOCK THESE IN**
>
> - Work writing is judged by what the reader can do after four seconds, so the conclusion goes first.
> - BLUF: the first two sentences say what this is about, what you want, and by when.
> - Action request: I need [who] to [do what] by [when] so that [consequence]. Missing deadline makes a suggestion; missing consequence makes it optional; missing name makes it nobody's job.
> - Four readers: primary acts, secondary is copied, gatekeeper controls access, tertiary reads it cold years later.
> - Purpose statement: reader, specific action, date and a reason that matters to them. If you cannot fill every slot, you are not ready to write.
> - Four jobs: inform, request, persuade, record. One primary job and one ask per document.



Four readers hide in one distribution list. The gatekeeper decides whether the primary reader sees it, secondary readers are copied, and a tertiary reader may open it years later with none of your context.

Key terms and comparisons

Term	What it means	Use it for
Primary reader	The person who must approve, act or answer	Structure the message for this reader
Gatekeeper	Assistant, reviewer, supervisor, legal or compliance	Give a forwardable summary with no policy problems
Secondary reader	Copied or affected colleague	Tell them first, so they do not hear it as a rumor
Tertiary reader	Future auditor, surveyor, attorney, successor	Dates, names, numbers, no unexplained gaps
Translation gap	Accurate content pitched above what the reader can act on	A warning sign when an expert writes for a manager
Stakes	What a reader stands to gain, lose or answer for	Name the stake in your opening
Register	The formality a relationship and setting expect	Calibration, not politeness
Constraint	Time, policy, privacy, hierarchy, accessibility	Shapes what may be said, how and when
Document of record	Writing retained as evidence of what was known or done	Write for a reasonable stranger
Discoverability	Retained messages can be compelled in litigation or audit	No off-the-record work message

Worked cases

CASE 1.1 · ONE PURPOSE, REBUILT

Rewrite "Ask about tuition reimbursement" as a purpose statement the reader can answer quickly.

STEP 1 · READER AND ACTION

The benefits coordinator will tell me whether my summer statistics course qualifies under policy HR-22.

STEP 2 · ADD THE RETURN AND DATE

...and what form I file by 15 May.

WHY IT WORKS

It asks a closed question the reader can answer in one line from a phone. Requests that are cheap to answer get answered.

TRAPS PEOPLE FALL INTO

- **Writing for a reader who is paid to finish.** At work nobody owes you a second paragraph. Lead with the point.
- **Calling front-loading rude.** It is a courtesy. The wrong reader can stop in four seconds instead of forty.
- **Writing only for the To line.** The gatekeeper and the tertiary reader read differently and can stall or judge the message.
- **Stating a topic as a purpose.** "The new scheduling software" is a topic. A purpose names a reader, a verb and a date.

Chapter 1 self-test · six items

1. Why does front-loading the main point count as a courtesy?

A. It makes the message longer and therefore more thorough
B. It hides the request until the reader has all the background
C. It lets the writer show the order in which they worked
D. The wrong reader can stop in seconds instead of reading on

D. The wrong reader can stop in seconds instead of reading on Front-loading lets a reader who is not the right person stop early and lets the right one act.

2. An auditor opens your memo three years later. Which reader type is the auditor?

A. Primary
B. Secondary
C. Tertiary
D. Gatekeeper

C. Tertiary A tertiary reader is the future stranger reading without your context.

3. Which is a purpose, not a topic?

A. The new scheduling software and its upcoming go-live date
B. Dana approves two training hours each by 15 September
C. Our quarterly numbers for the medical-surgical units
D. Some thoughts about the incident that happened Tuesday

B. Dana approves two training hours each by 15 September A purpose names a reader, an action and a date.

4. Which channel rule does the chapter give?

A. Bad news goes to voice; the record goes to writing
B. Everything important should be typed into team chat right away
C. Phone calls are best for anything that must be retained
D. Formal memos are the default for routine coordination

A. Bad news goes to voice; the record goes to writing Deliver hard things in conversation, then write a short summary for the record.

5. What does the ten-second test check?

A. Whether the draft can be read aloud in ten seconds
B. Whether every sentence is ten words or fewer long
C. Whether the subject line fits in ten characters
D. Whether a colleague can say what you want, by when

D. Whether a colleague can say what you want, by when If they cannot say it, the document is not finished, however clean the sentences are.

6. Which item belongs in an incident record?

A. Patient fell, probably because night staff were slammed again
B. Found on floor at 02:14, unwitnessed; no visible injury
C. The night aide clearly should have been watching more closely
D. Another fall on the night shift, as everyone predicted

B. Found on floor at 02:14, unwitnessed; no visible injury Records hold observed fact. Even "fell" is an inference when nobody saw it.

CHAPTER 2

Professional Email and Correspondence

Read it in full: **Chapter 2 in the textbook**. Practice it in the lab: **Thread Triage** and **Assemble the Ask**.

What to know

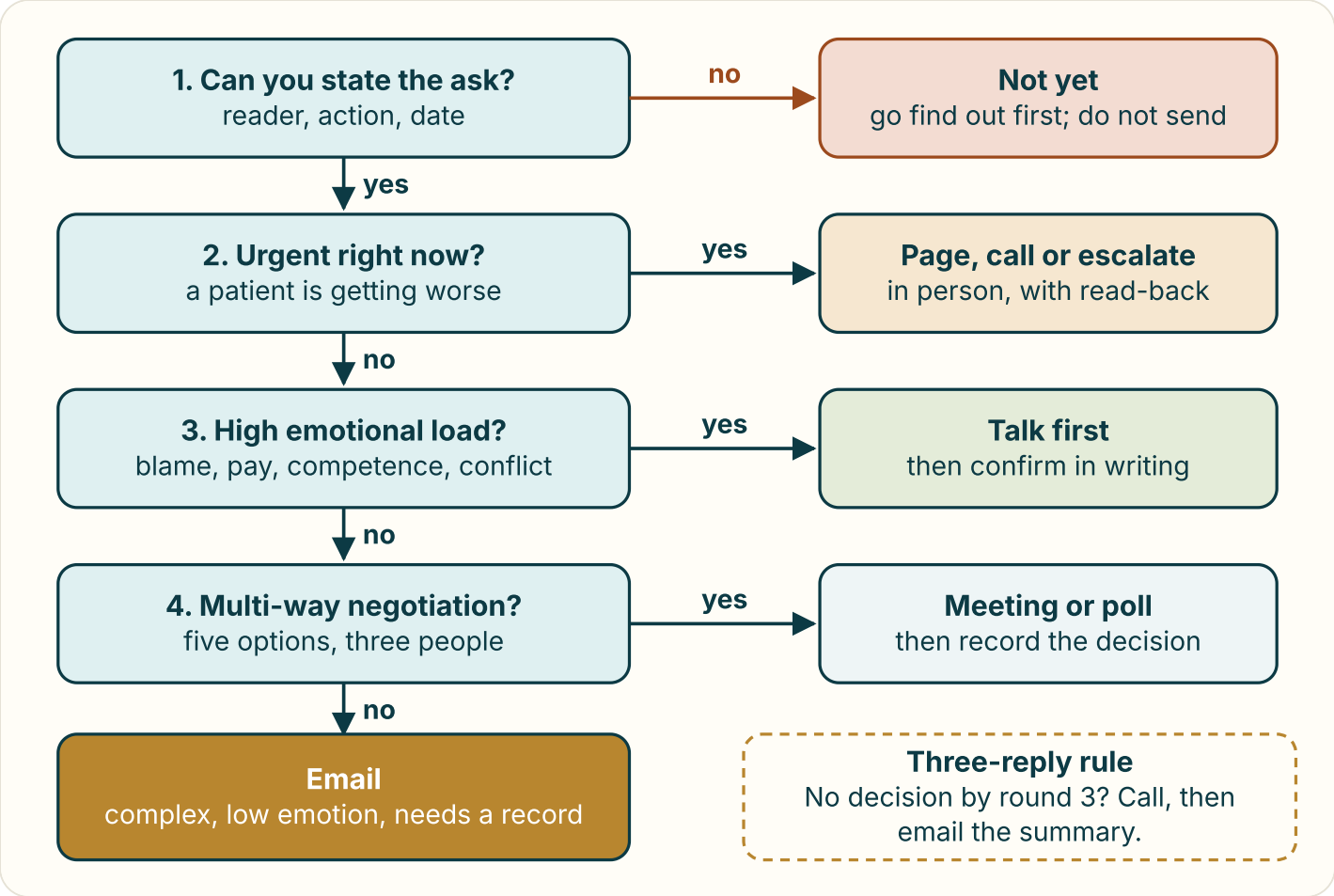
Run the channel-fit test before you write: complexity, emotion, urgency and the need for a record. Email suits complex, low-emotion, record-worthy business; urgent clinical problems go to a page or call; high emotion plus complexity means talk first, confirm in writing. The three-reply rule: no decision by round three, move to a call and email the summary.

The subject line is a filename: topic, action and date, distinguishing word first, written last. Mirror the correspondent's formality one notch up, use the credential the person uses, and give a full signature block. BLUF puts the ask in the first two sentences; a one-sentence buffer is only for genuinely bad news. Every ask names the actor, the action and the date, and "No action needed" saves every reader a search.

Register rises with distance, power and weight. Hedge the relationship, never the requirement. Bad news: buffer, news, reason, path forward. Apology: what happened, your part, the correction, the prevention. To means act, CC means informed, BCC is hidden (clean for mass mailings and announced moves). Trim forwards, keep PHI out of subject lines, report mis-sends at once, and fill in the address last.

LOCK THESE IN

- Channel-fit: complexity, emotion, urgency, need for a record. Talk first, confirm in writing for high emotion plus complexity.
- Three-reply rule: no decision by the third round means change the channel.
- Subject line = filename: topic, action, date, under about sixty characters, written last.
- BLUF in the first two sentences; a one-sentence buffer only for genuinely bad news.
- Every ask: actor, action, date, plus the consequence if the date slips. Say "No action needed" when true.
- Register rises with distance, power and weight. Hedge the relationship, never the requirement.



The channel-fit test. Ask four questions before you type. Email wins only when the content is complex, the emotion is low and a record matters.

Key terms and comparisons

Term	What it means	Use it for
Asynchronous	Both sides need not be present at once	Email's defining strength
Buffer	One neutral sentence before unwelcome news	Bad news only; one sentence, not a paragraph
Chunking	Short single-idea paragraphs and labeled lists	Messages a reader will scan
Hedge	Softening word: maybe, I think, when you get a chance	The relationship, never the deadline
Escalation	Raising a matter to higher authority or a stronger channel	Announce it; covert escalation damages trust
Signature block	Name, role, unit, organization, phone	So a reader can reach you without searching
PHI	Individually identifiable health information	Restricted by HIPAA; never in a subject line
FERPA	U.S. law on student education records	Restricts disclosure, logs it; no breach-notification duty

Worked cases

CASE 2.1 · A CALIBRATED FOLLOW-UP

Rewrite "Circling back on my last email" so it can be acted on.

STEP 1 · RESTATE THE ORIGINAL ASK WITH ITS DATE

"Following up on my 3/2 request for the March census file."

STEP 2 · ADD AN OFF-RAMP

"If it is not available, tell me who owns it and I will ask them directly."

CHECK

No grievance, no "as I mentioned twice": just the ask, a date and a way to close the loop.

TRAPS PEOPLE FALL INTO

- **Fixing wording when the channel is wrong.** A third reply with no decision means call, not rewrite.
- **"Quick question" as a subject.** It describes your intent, not the reader's business, and cannot be searched later.
- **Warmth before the point.** "Hope the move went smoothly" belongs in sentence three, after the ask.
- **Hedging the deadline.** "If you get a chance" tells the reader a 72-hour requirement is optional.

Chapter 2 self-test · six items

1. A patient's condition is getting worse right now. Which channel fits?

A. Page, call or escalate, with read-back

B. An email to the provider marked high priority

C. A message in the unit's team chat channel

D. A formal memo to the nurse manager tomorrow

A. Page, call or escalate, with read-back Urgency plus read-back confirmation bypasses the inbox.

2. Which subject line works best?

A. Important!! Please read this as soon as you can

B. Action by Fri 3/20: sign HIPAA attestation

C. Quick follow-up on the thing we talked about

D. Question about a few items from the meeting

B. Action by Fri 3/20: sign HIPAA attestation It names the action, the item and a real deadline.

3. Why write the subject line last?

A. Email software sorts messages by the last field you fill in
B. Subject lines must match the length of the first sentence
C. Readers skip subject lines, so they matter the least
D. You often learn what the email is about only by drafting it

D. You often learn what the email is about only by drafting it Compress the request sentence into the subject; if you cannot, it may be two emails.

4. What is the problem with heavy hedging around a real requirement?

A. It makes the message sound too formal and cold
B. It breaks the BLUF rule about subject lines
C. It tells the reader the requirement is optional
D. It is grammatically incorrect in formal email

C. It tells the reader the requirement is optional Hedge the relationship, not the deadline or the safety issue.

5. When is reply-all the right choice?

A. When correcting an error everyone received
B. When thanking the sender for a helpful update
C. When adding a quick joke to lighten the thread
D. When asking the sender a side question privately

A. When correcting an error everyone received Reply-all fits shared corrections, duplicate-work prevention and real group decisions.

6. What should you do first after sending PHI to the wrong person?

A. Rely on the recall button and say nothing more
B. Send a second email asking them to ignore it
C. Notify your supervisor or privacy officer
D. Wait to see whether the recipient mentions it

C. Notify your supervisor or privacy officer Recall works only sometimes and only internally. Speed matters more than composure.

CHAPTER 3

Clarity, Plain Language and Tone

Read it in full: **Chapter 3 in the textbook**. Practice it in the lab: **The Sentence Engine** and **The Five-Pass Revision**.

What to know

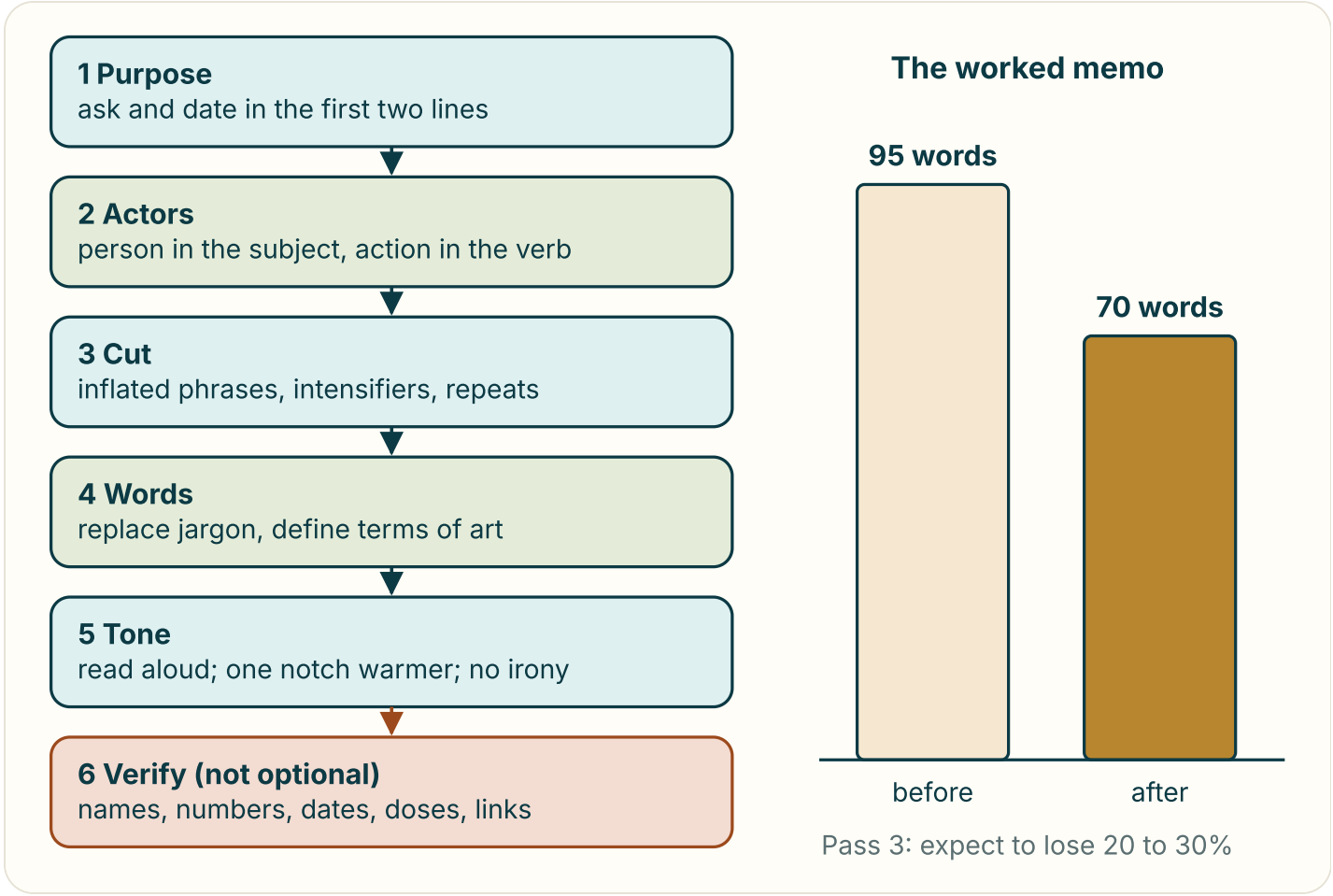
Plain language means the intended reader can **find**, **understand** and **use** the information (ISO 24495-1, 2023). The three fail differently, so simplifying words often fixes nothing. Because of the curse of knowledge you cannot judge your own clarity; use an outside reader or a day's distance.

Put a person or organization in the subject slot and the real action in the verb. Unfreeze nominalizations and delete expletive openers. The passive is a choice: keep it when the actor is unknown or irrelevant, fix it when the actor is the point. Swap inflated phrases, define terms of art once, replace jargon, and never use do-not-use abbreviations. For patients, give numbers, break compound instructions apart, and verify with teach-back.

Tone is inferred: write one notch warmer, avoid irony, and say no with the word no. A refusal acknowledges, decides, explains, offers and leaves the door open. Revise in named passes (purpose, actors, cut, words, tone, then verify). Readability formulas count syllables and sentence length; treat them as a smoke alarm and test with a real reader.

LOCK THESE IN

- Plain language = the intended reader can find, understand and use it (ISO 24495-1, 2023).
- Sentence engine: actor in the subject slot, real action in the verb slot.
- Nominalization suffixes: -tion, -ment, -ance, -ence, -ity, -ure, -al. Fine when the process is the topic.
- Passive is a choice, not an error; the agentless passive is a problem when the actor is the point.
- Jargon versus term of art: can I replace it without losing precision? If no, keep it and define it once.
- Tone is inferred: one notch warmer, no irony, and the word no when the answer is no.



Five named passes, then verify. Each pass hunts for one thing, so it finds it. In the chapter's worked memo the routine took 95 words down to 70 while adding a policy number, a deadline and a reason.

Key terms and comparisons

Term	What it means	The working rule
Find / understand / use	Three parts of the plain language test	Each fails differently and needs its own repair
Nominalization	Verb or adjective frozen into a noun	Unfreeze it unless the process is the topic
Expletive construction	There is, It is important that	Delete the opener; the real subject comes forward
Agentless passive	Passive with the by phrase deleted	Name the actor when the actor is the point
Jargon	Insider word used on an outsider	Defined by the reader; replace it
Term of art	Precise term with no plain equivalent	Keep it; define it once
Intensifier	very, really, extremely	Usually props up a weak word
You-attitude	Writing from the reader's side of the desk	Say what they can do, not what you require
Teach-back	Patient explains the plan in their own words	Frame it as a test of your explanation
Readability formula	Sentence length plus syllables	Smoke alarm, not proof

Worked cases

CASE 3.1 · FREEING A BURIED VERB

Rewrite "Notification of the family was performed by the charge nurse."

STEP 1 · FIND THE ACTOR AND ACTION

The charge nurse; called.

STEP 2 · REBUILD AND ADD WHAT THE READER NEEDS

"The charge nurse called the family at 21:40."

CHECK

Passive plus nominalization plus placeholder verb became who, what and when.

TRAPS PEOPLE FALL INTO

- **Judging your own clarity.** You recognize your draft; you do not decode it. Get an outside reader or wait a day.
- **Treating every complaint as vocabulary.** Find, understand and use fail differently. Short words do not fix a buried deadline.
- **Banning all nominalizations.** "The investigation lasted six weeks" is fine; the process is the topic.
- **Calling every flat sentence passive.** Passive is a structure: the thing acted upon is the subject. Learn it, then decide.

Chapter 3 self-test · six items

1. Why can you not judge your own draft's clarity reliably?

A. Your spelling checker hides errors from you
B. Your reading level is higher than any reader's
C. You recognize your text instead of decoding it
D. Drafts always look clearer on a large screen

C. You recognize your text instead of decoding it That is the curse of knowledge. Use an outside reader or time away.

2. Which sentence is an expletive construction?

A. All staff must complete the module by 30 June
B. There is a need for all staff to complete it
C. The charge nurse called the family at 21:40
D. We will roll out the protocol on 1 August

B. There is a need for all staff to complete it The empty opener delays the real subject; deleting it helps twice.

3. Which word is a term of art rather than jargon for a clinical reader?

A. Utilize
B. Facilitate
C. Leverage
D. Sepsis

D. Sepsis Sepsis has a precise meaning with no plain equivalent; keep it and define it once for lay readers.

4. What is the main problem with "Drink plenty of fluids"?

A. It is plain but vague, with no number to act on
B. It uses medical jargon most patients do not know
C. It is written in the passive voice for no reason
D. It is too long for a patient discharge handout

A. It is plain but vague, with no number to act on Plain is not the same as usable. Give an amount and any exception.

5. Which phrase does the chapter flag as literally polite but heard as hostile?

A. Thanks for asking
B. Happy to help here
C. Good question, Sam
D. Per my last email

D. Per my last email It marks the reader as at fault while keeping deniability.

6. What is the first named revision pass?

A. Purpose
B. Tone
C. Words
D. Actors

A. Purpose Purpose first: can a stranger say what you want and by when after two lines?

CHAPTER 4

Document Design and Readability

Read it in full: **Chapter 4 in the textbook**. Practice it in the lab: **Shape Shifter** and **The Squint Test Studio**.

What to know

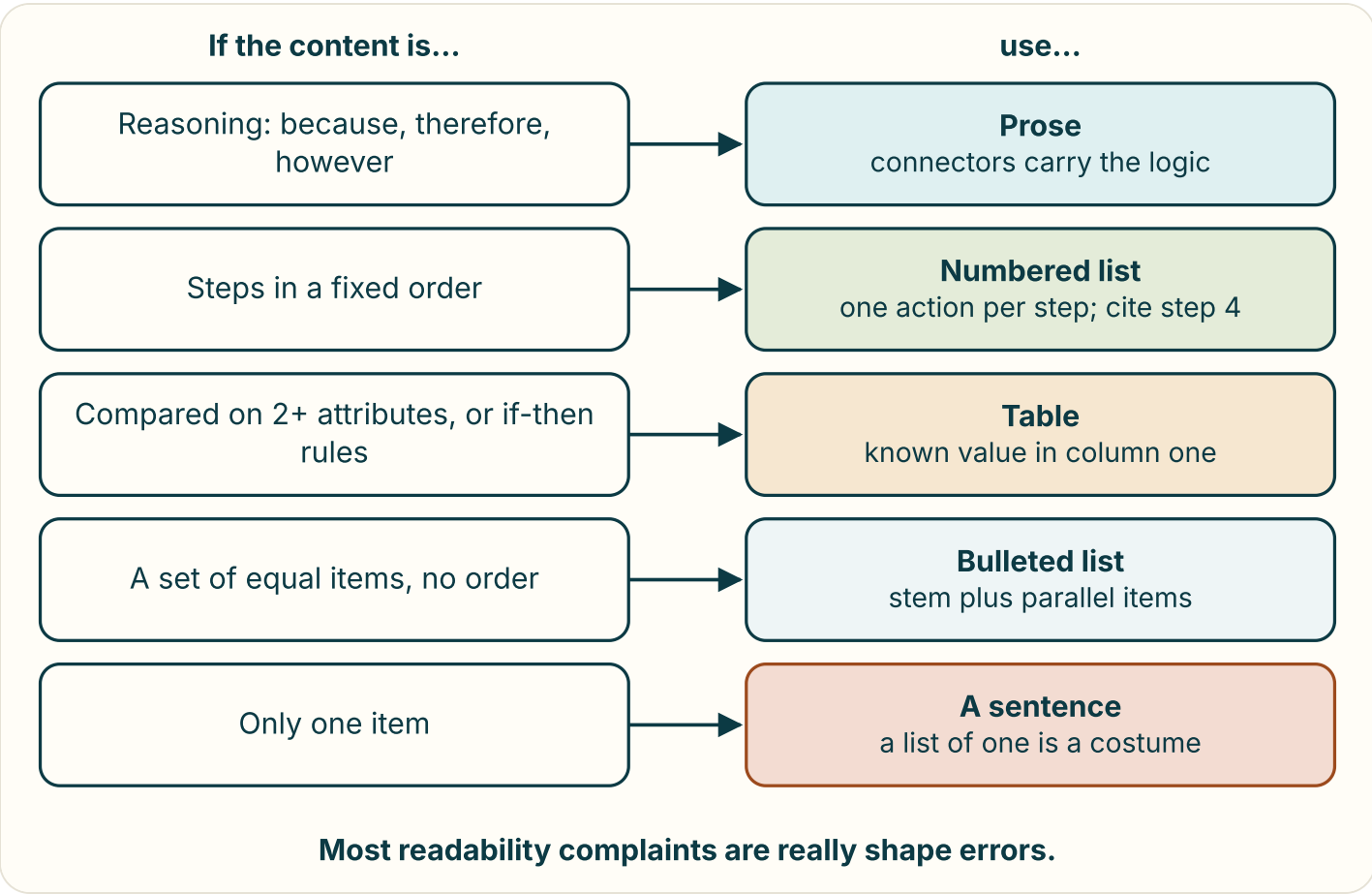
Readers scan before they read, so design is delivery, not decoration. Put the load-bearing word at the top-left of each block, and create useful difference with **proximity**, **alignment**, **contrast** and **repetition**. Legibility is telling characters apart; readability is getting meaning without undue effort.

Chunk one idea per block with a lead sentence. Write informative headings, keep levels honest (no skipped level, no lone subheading), keep them parallel and run the outline test. Match form to content: prose reasons, numbered lists sequence, bullets list equal items, tables compare and handle if-then conditions.

Spend emphasis like a fixed budget and never let color carry meaning alone. Use real heading styles, alt text that states the point, link text that names the destination, and WCAG contrast of 4.5 to 1 (3 to 1 for large text). Check on a phone, in greyscale and with a real reader; formulas cannot see design.

LOCK THESE IN

- Readers scan before they read; the top-left of every block carries the load-bearing word.
- Proximity, alignment, contrast, repetition. Space above a heading is larger than space below.
- One idea per chunk, lead sentence first; headings state content, not genre.
- Never skip a heading level; no lone subheading; same-level headings parallel; run the outline test.
- Prose for reasoning, numbered list for sequence, bullets for sets, tables for comparisons and conditions.
- Table: known value in column one, units in headers, no blank cells meaning zero, about six columns at most.



Match the form to the content. Most readability complaints are shape errors: reasoning forced into bullets, or a comparison forced into prose.

Key terms and comparisons

Term	What it means	Note
Legibility	Characters can be told apart	Size, contrast, print quality
Readability	Meaning comes without undue effort	Language and layout together
Proximity	Close things read as one group	More space above a heading than below
Alignment	Each element lines up with something	Pick a left edge
Contrast	Different things look clearly different	Two full steps, not one point
Repetition	Same thing done the same way	Lets readers learn the document once
Stem	Line above a list saying what it holds	All-of, any-of or one-of
Measure	Line length	45 to 75 characters; about 66
Leading	Space between lines	1.15 to 1.5 times type size
Semantic heading	Built-in heading style or tag	Screen readers can jump between sections

Worked cases

CASE 4.1 · CHOOSING WHAT TO BOLD

A sentence reads: "Submit the attestation form to Employee Health by March 14." What should be bold?

STEP 1 · ASK WHAT HARMS THE READER IF MISSED

Missing the deadline is the risk.

STEP 2 · BOLD THE PHRASE

Bold "by March 14", not "attestation form".

CHECK

One or two emphasized items a page; a scatter of bold single words reads as damage.

TRAPS PEOPLE FALL INTO

- **"Formatting is cosmetic."** A requirement nobody can locate is a requirement nobody follows.
- **Genre headings.** "Background" and "Discussion" tell the reader nothing they can use.
- **A lone subheading.** A division into one part is not a division.
- **Bulleting an argument.** Bullets strip because, therefore and however, and the logic goes with them.

Chapter 4 self-test · six items

1. What does the squint test reveal?

A. What stands out in a reader's first second
B. Whether the body text meets contrast rules
C. How many words each paragraph contains
D. Which typeface the document is set in

A. What stands out in a reader's first second Blur the page; if one uniform rectangle remains, nobody will find anything.

2. Which is a lone-subheading problem?

A. Section 3 has 3.1, 3.2 and 3.3
B. Section 3 has no subsections at all
C. Section 3 has only 3.1 and no 3.2
D. Section 3 heading is written in bold

C. Section 3 has only 3.1 and no 3.2 A division into one part is not a division.

3. A list has eleven items. What does the chapter suggest?

A. Number it so readers can count items
B. Group it into labeled lists or a table
C. Bold every other item for some rhythm
D. Turn each item into a full paragraph

B. Group it into labeled lists or a table Past about seven items, a list stops being scannable.

4. Which line length is the conventional comfortable measure?

A. About 15 to 25 characters
B. About 100 to 140 characters
C. Any length, if leading is 2.0
D. About 45 to 75 characters

D. About 45 to 75 characters About 66 characters is a common target; the evidence is mixed, so it is a default, not a law.

5. Why should underline be avoided for emphasis in digital documents?

A. Underline is not allowed by WCAG contrast rules
B. Underline slows reading more than all caps
C. Readers expect underlined text to be a link
D. Screen readers announce every underline aloud

C. Readers expect underlined text to be a link Underline now effectively means hyperlink.

6. What is 14-point bold text treated as under WCAG?

A. Ordinary text, needing 4.5 to 1
B. Large text, needing 3 to 1
C. Decorative text, needing no ratio
D. Heading text, needing 7 to 1

B. Large text, needing 3 to 1 Large text is at least 18 point, or 14 point bold.

CHAPTER 5

Memos, Letters and Short Reports

Read it in full: **Chapter 5 in the textbook**. Practice it in the lab: **The Form Router** and **The Evidence Bench**.

What to know

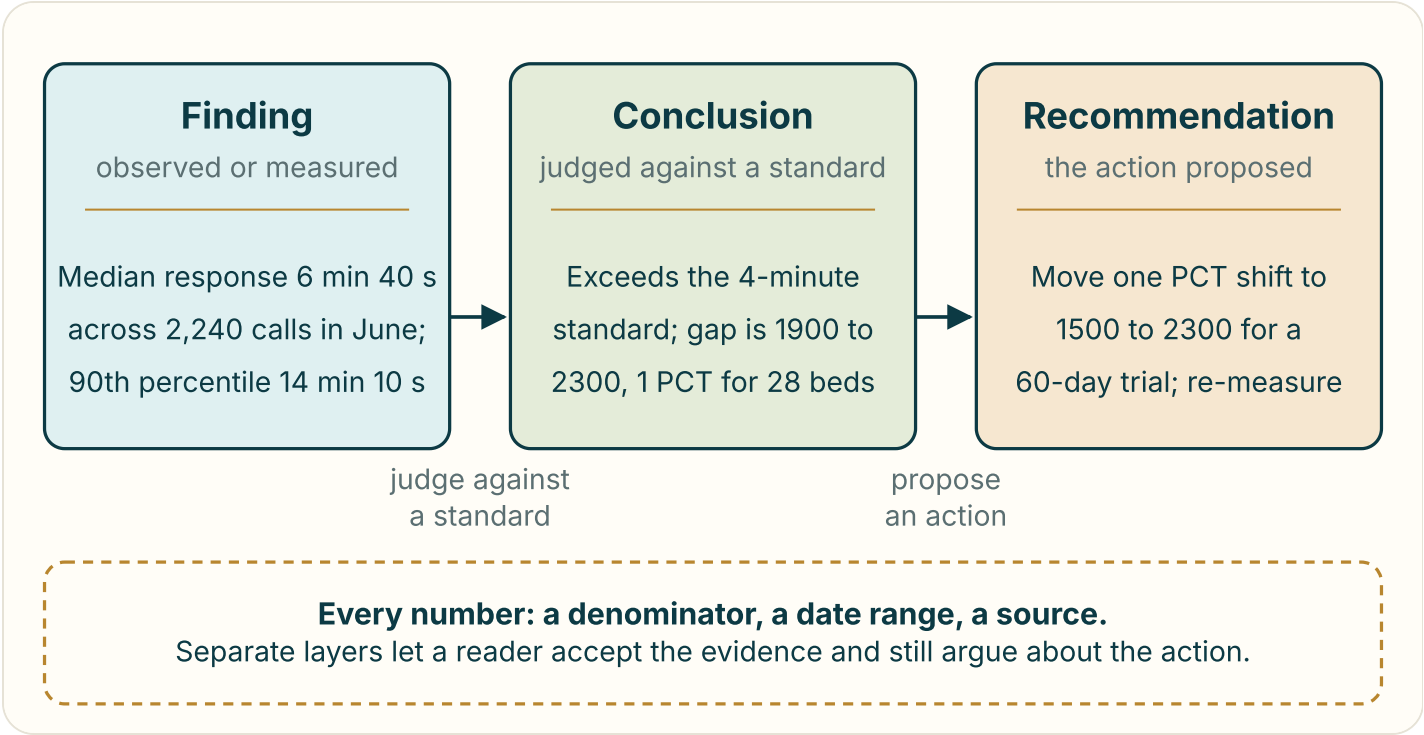
A memo is internal and assumes shared context; a letter is external and speaks as the institution; a short report is defined by findings gathered by a method the reader can check. Choose genre, then channel, then register. The memo header gives TO (responsible), FROM, DATE (written out) and a SUBJECT naming topic and stake; open with the decision in thirty words or fewer and close with an action line.

Letters run letterhead, date, inside address, salutation (a colon in U.S. business practice), body, close, signature, name and title, then enclosure and copy notations. Use the direct approach for requests, good news, claims and adjustments; refusals get at most one buffer sentence, a plain no, the real reason and real alternatives. Separate regret from an admission of fault.

Keep finding, conclusion and recommendation separate. Every number needs a denominator, date range and source. Incident narratives record observation, not inference, and the report usually stays outside the medical record. Persuade with problem, cost, options and one dated ask; revise against a checklist; route and keep documents as records.

LOCK THESE IN

- Memo internal, letter external, report defined by findings. Genre first, channel second, register third.
- Memo header: TO responsible, cc informed; date written out; subject names topic and stake.
- BLUF in thirty words or fewer; end with an action line (who, what, by when, how confirmed).
- Letter order: letterhead, date, inside address, salutation, body, close, signature, name and title, enclosure, cc.
- U.S. salutation takes a colon; one-sentence buffer at most before a plain refusal and a real alternative.
- Finding (observed) → conclusion (judged against a standard) → recommendation (action).



Three layers, one body of evidence. Keeping the finding, the conclusion and the recommendation visibly separate lets a director accept your data while still arguing about the action.

Key terms and comparisons

Feature	Memo	Letter	Short report
Primary reader	Inside the organization	Outside the organization	Either; defined by content
Typical length	One page or less	One page	Two to five pages
Opening move	The decision or the action	Who you are and why you write	Purpose, then the headline finding
Formality	Plain, efficient	Formal, institutional	Neutral, evidentiary
Signature	Initials beside FROM, if any	Handwritten or verified electronic	Named author, title, date
Leaves behind	Operational record of a change	Legally weighted statement	Evidence someone can re-check

Worked cases

CASE 5.1 · A REFUSAL WITH REAL ALTERNATIVES

Turn down a CCRN review-course tuition request.

STEP 1 · ONE BUFFER SENTENCE, THEN THE NO

"Thank you for the detailed application. We cannot approve tuition reimbursement for the CCRN review course."

STEP 2 · THE REAL REASON

The fund covers only coursework leading to a degree or initial license; the CCRN is a specialty certification.

STEP 3 · NEXT STEPS

The department can pay the exam fee directly, and the course qualifies for eight hours of paid education time.

TRAPS PEOPLE FALL INTO

- **Confusing channel with genre.** An emailed PDF letter is still a letter; a corkboard memo is still a memo.
- **Announcing that a decision exists.** "A decision has now been reached" never says what the decision is.

- **Numeric dates.** 8/3/26 reads as March 8 to much of the world. Write August 3, 2026.
- **Cc as pressure.** Everyone can read the tactic. Escalate openly if escalation is warranted.

Chapter 5 self-test · six items

1. Which form fits a change to badge access for your own department only?

A. A letter
B. A long report
C. A proposal
D. A memo

D. A memo Internal, announcing a change, no findings: a memo, even if it travels by email.

2. What is an action line?

A. One sentence: who does what by when, and how confirmed
B. The subject line of a memo when it names a deadline
C. The first sentence of a letter that states the purpose
D. A list of every action the writer took that week

A. One sentence: who does what by when, and how confirmed It closes any memo that asks for something.

3. Why does the inside address stay in a letter even though the envelope has one?

A. Postal rules require it on every single page
B. It travels with the letter into the file
C. It replaces the need for a signature
D. It tells the reader where to reply

B. It travels with the letter into the file A reader years later knows who received it and in what role.

4. What three things does every reported number need?

A. A chart, a caption and a footnote
B. A trend line, a target and an owner
C. A denominator, a date range, a source
D. A decimal, a unit and a color

C. A denominator, a date range, a source Add the pull date for dashboard figures.

5. What is a transmittal document?

A. A letter that formally terminates a contract
B. A cover memo or letter for a larger package
C. A report that tracks progress against a plan
D. An email that forwards a thread to a manager

B. A cover memo or letter for a larger package It states what is enclosed, why, what to read first and the next step.

6. Why put a version and date in a report's file name and footer?

A. Software requires dates to open older documents
B. Auditors only accept files with numbers in the name
C. It makes the document look more official to readers
D. Undated copies that disagree are worse than none

D. Undated copies that disagree are worse than none 4West_calllight_report_2026-07-14_v2 can be found and trusted later.

CHAPTER 6

Long Reports and Proposals

Read it in full: **Chapter 6 in the textbook**. Practice it in the lab: **The Scope Contract** and **Answer the Ask: Compliance Matrix Lab**.

What to know

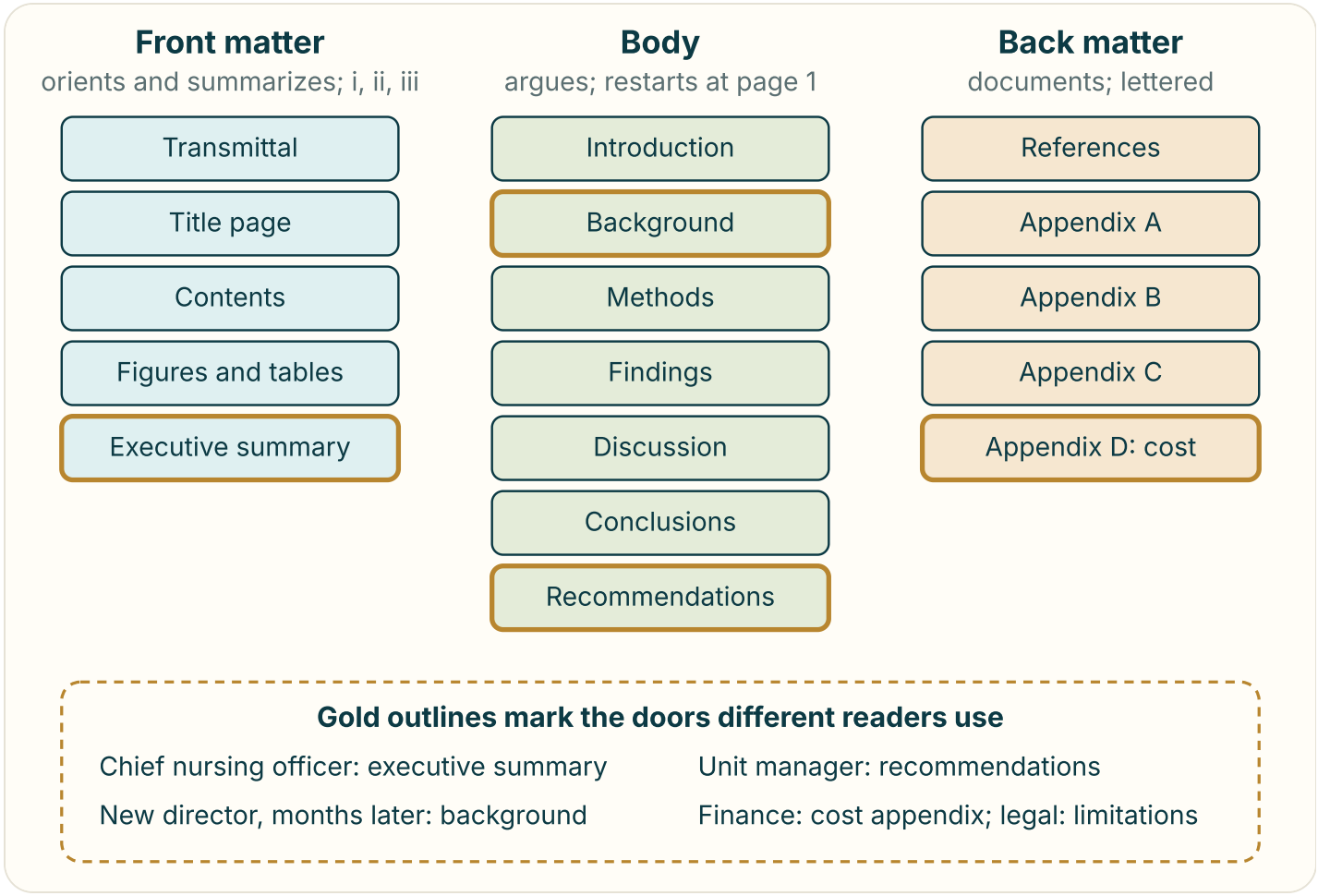
Long reports are used in pieces by people who never meet you, so every module must stand alone. Write a scope statement first (problem, purpose, out of scope, evidence, deliverable). Front matter orients and summarizes, the body argues, back matter documents. Choose direct or indirect order on purpose and say which.

The executive summary stands alone with findings, recommendations and cost; write it last and test what a reader would do on Monday. Keep findings, conclusions and recommendations traceable, and give each recommendation an owner, a date and a cost. Match claim language to evidence and name limitations first.

Proposals compete. Know RFI, RFQ, RFP and NOFO; build a compliance matrix on day one (Section C work, L instructions, M scoring), answer in the scorer's words and proportions, replace slogans with discriminators, repeat a few win themes, make the budget match the narrative, red-team against the criteria and submit early.

LOCK THESE IN

- Long reports are used in pieces, so every part must stand alone: write modular.
- Scope statement: problem, purpose, out of scope, evidence, deliverable. The out-of-scope line saves the most rework.
- Front matter in roman numerals, body from arabic 1, appendices lettered and referenced by name.
- Direct order for busy or receptive readers; indirect for skeptics; often direct summary, indirect body.
- Executive summary stands alone: findings, recommendations, cost. Written last, read first.
- A recommendation needs an owner, a date and a cost; otherwise it is a wish.



A report readers enter by different doors. Front matter orients, the body argues, back matter documents. Each highlighted part may be the only one a given reader opens.

Key terms and comparisons

Term	What it means	Note
Scope statement	Written agreement on problem, purpose, exclusions, evidence, deliverable	Often half a page, often in an email
Talking heading	States the content of a section	Unless a template mandates titles
Abstract	Compressed account for deciding whether to read	Descriptive or informative
Executive summary	Standalone: findings, recommendations, cost	For a reader who will not read further
Limitations	What the evidence cannot support, and why	Introduction or discussion; not footnotes
Discriminator	Checkable claim true of you, not competitors	The opposite of "committed to excellence"
Win theme	2 or 3 evidence-backed claims repeated	Drawn from the solicitation's priorities
Compliance matrix	One row per solicitation requirement	Outline, assignment sheet and checklist
Red team review	Hostile internal scoring against the criteria	Ask where you lose points
Boilerplate	Reusable standard text	Search for the last client's name

Worked cases

CASE 6.1 · A TALKING HEADING

Rewrite the generic heading "3.4 Staffing Considerations".

STEP 1 · FIND THE FINDING

The evening aide position was cut in October and not backfilled.

STEP 2 · STATE IT

"3.4 The evening aide position was cut in October and not backfilled."

EXCEPTION

If a template mandates titles, keep the required heading and put this sentence directly under it.

TRAPS PEOPLE FALL INTO

- **Writing a long report to be read in order.** Nobody reads it front to back. Every module must stand alone.
- **No out-of-scope line.** The reader will look for something you were never asked to produce.
- **A summary that only announces findings exist.** "A number of themes emerged" tells the reader nothing. State them.
- **Recommendations as wishes.** No owner, date or cost means it cannot be scheduled, funded or audited.

Chapter 6 self-test · six items

1. Which part of a long report do decision-makers often read alone?

A. The methods
B. The appendix
C. The sources
D. The summary

D. The summary For most decision-makers the summary is the report.

2. How are appendices handled?

A. Numbered in roman numerals like front matter
B. Placed before the executive summary
C. Lettered and referenced by name in the body
D. Left unreferenced so readers can browse them

C. Lettered and referenced by name in the body An appendix never referenced is an appendix never opened.

3. What distinguishes an informative abstract from a descriptive one?

A. It lists the topics covered
B. It states the actual results
C. It thanks the contributors
D. It names the funding agency

B. It states the actual results Descriptive abstracts say what is covered; informative abstracts give results.

4. Where do secondary sources belong in a long report?

A. Background and discussion
B. Findings about your own unit
C. The cost appendix only
D. The title page and cover

A. Background and discussion Local primary data carries findings; secondary sources set context.

5. Which request awards nothing?

A. An RFQ
B. An RFP
C. An RFI
D. A NOFO

C. An RFI An RFI gathers market information.

6. What should a budget narrative do?

A. Repeat the win themes from the executive summary

B. List competitors' prices for comparison

C. Round every figure to the nearest thousand

D. Justify each line with the calculation behind it

D. Justify each line with the calculation behind it It shows the number came from arithmetic, not a wish.

CHAPTER 7

Instructions, Procedures and Policy

Read it in full: **Chapter 7 in the textbook**. Practice it in the lab: **Step Surgery** and **The Hazard Message Composer**.

What to know

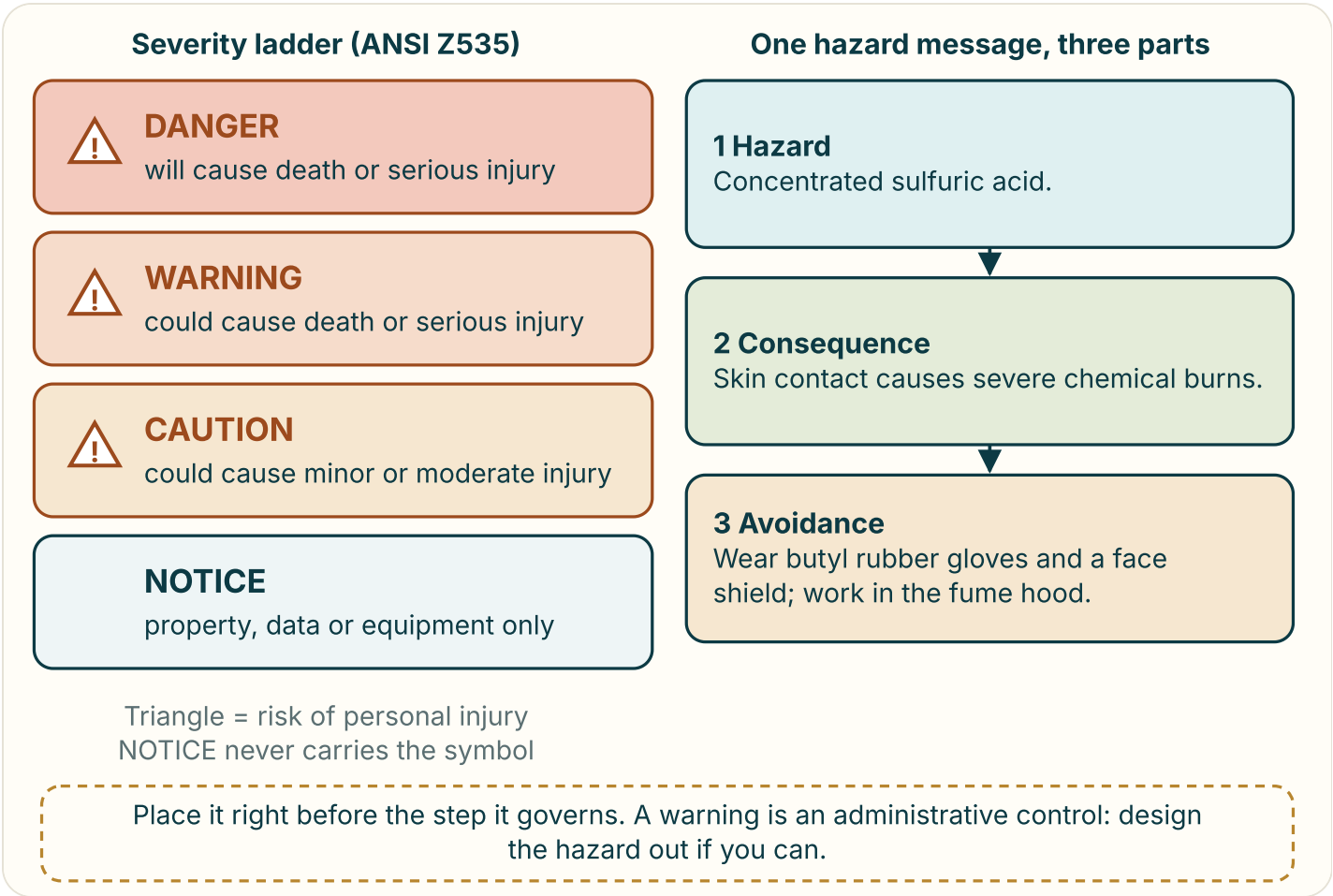
Policy answers am I allowed to; procedure answers whose job and in what order; work instructions answer which button; protocols fire on a condition; guidelines advise. Build from task analysis, and give scaffolding before step 1: title, purpose, scope, prerequisites, materials and time.

Each step is one imperative action, with location before action and condition before command, and the task ends in a visible verification. Branching on more than one variable needs a decision table with a row for when the rule cannot be followed.

Grade hazards honestly with ANSI Z535 signal words, write hazard, consequence and avoidance, and place the message just before the step. Warnings rank low in the hierarchy of controls. Choose modal verbs deliberately (must, must not, should, may, will), give every duty one owner, write an exception path, control versions, and run a silent field test.

LOCK THESE IN

- Policy = am I allowed to; procedure = whose job and in what order; work instruction = which button; protocol = triggered; guideline = advisory.
- Watch the work before writing; improvisations are the most valuable content.
- Before step 1: title, purpose, scope, prerequisites, materials, time.
- One imperative action per step; "and" is a defect detector.
- Location before action; condition before command; verification at the end.
- More than one branching variable: decision table, including the cannot-follow row.



Grade it, then say it in three parts. The signal word sets severity; the message states the hazard, what it does, and how to avoid it, right before the step.

Key terms and comparisons

Document	The reader's question	Binding force
Policy	What are we required to do, and why?	Mandatory; approved at leadership level
Procedure (SOP)	Who does what, in what order?	Mandatory for the named roles
Work instruction	Exactly how do I do this one task?	Mandatory where method is controlled
Protocol	When condition X appears, what is pre-authorized?	Mandatory once triggered
Guideline	What is recommended when I must judge?	Advisory; deviation usually documented

Worked cases

CASE 7.1 · LOCATION AND VERIFICATION

Rewrite "Select Export from the File menu" and add a checkpoint.

STEP 1 · LOCATION FIRST

"On the File menu, select Export."

STEP 2 · ADD THE EXPECTED RESULT

"The Export dialog opens."

WHY

The eye reaches the menu while reading the opening words, and the reader can see at once whether the step worked.

TRAPS PEOPLE FALL INTO

- **One document for three questions.** A policy full of keystrokes must go back through approval every time a screen changes.
- **"Prepare the sample" as a step.** If it can be done three ways, it is a heading. Break it down.
- **"For all staff."** True and empty. Say who, where, and who is not covered.

- **Unverifiable prerequisites.** "Be trained" cannot be checked in five seconds.

Chapter 7 self-test · six items

1. Which document is advisory, with deviation allowed?

A. A policy
B. A guideline
C. A protocol
D. A procedure

B. A guideline Guidelines exist because judgment is supposed to happen.

2. When may two micro-actions share one step?

A. Whenever they use the same piece of equipment
B. Whenever the writer wants a shorter list
C. When both actions start with the same verb
D. When stopping between them would make no sense

D. When stopping between them would make no sense "Sign and date the form" can stay together.

3. What does the safety alert symbol mean?

A. Personal injury risk
B. Risk of data loss only
C. Risk of equipment harm
D. A note for supervisors

A. Personal injury risk It accompanies DANGER, WARNING and CAUTION, never NOTICE.

4. Which is the correct three-part hazard message order?

A. Avoidance, hazard, consequence
B. Consequence, avoidance, hazard
C. Hazard, consequence, avoidance
D. Signal word, color, symbol only

C. Hazard, consequence, avoidance Name the threat, what it does, and how to avoid it.

5. Why assign duties to roles rather than named people?

A. Names go stale when people change jobs
B. Roles are shorter to type than names
C. Named people cannot be held accountable
D. Policies may never contain names at all

A. Names go stale when people change jobs "The unit manager" outlasts any individual.

6. What does a revision history entry need?

A. Only the date changed
B. The editor's job title
C. A count of words changed
D. What changed and why

D. What changed and why "v3.1: minor updates" tells a future reader nothing.

CHAPTER 8

Presenting Data and Visual Evidence

Read it in full: **Chapter 8 in the textbook**. Practice it in the lab: **The Finding Forge** and **The Distortion Lab**.

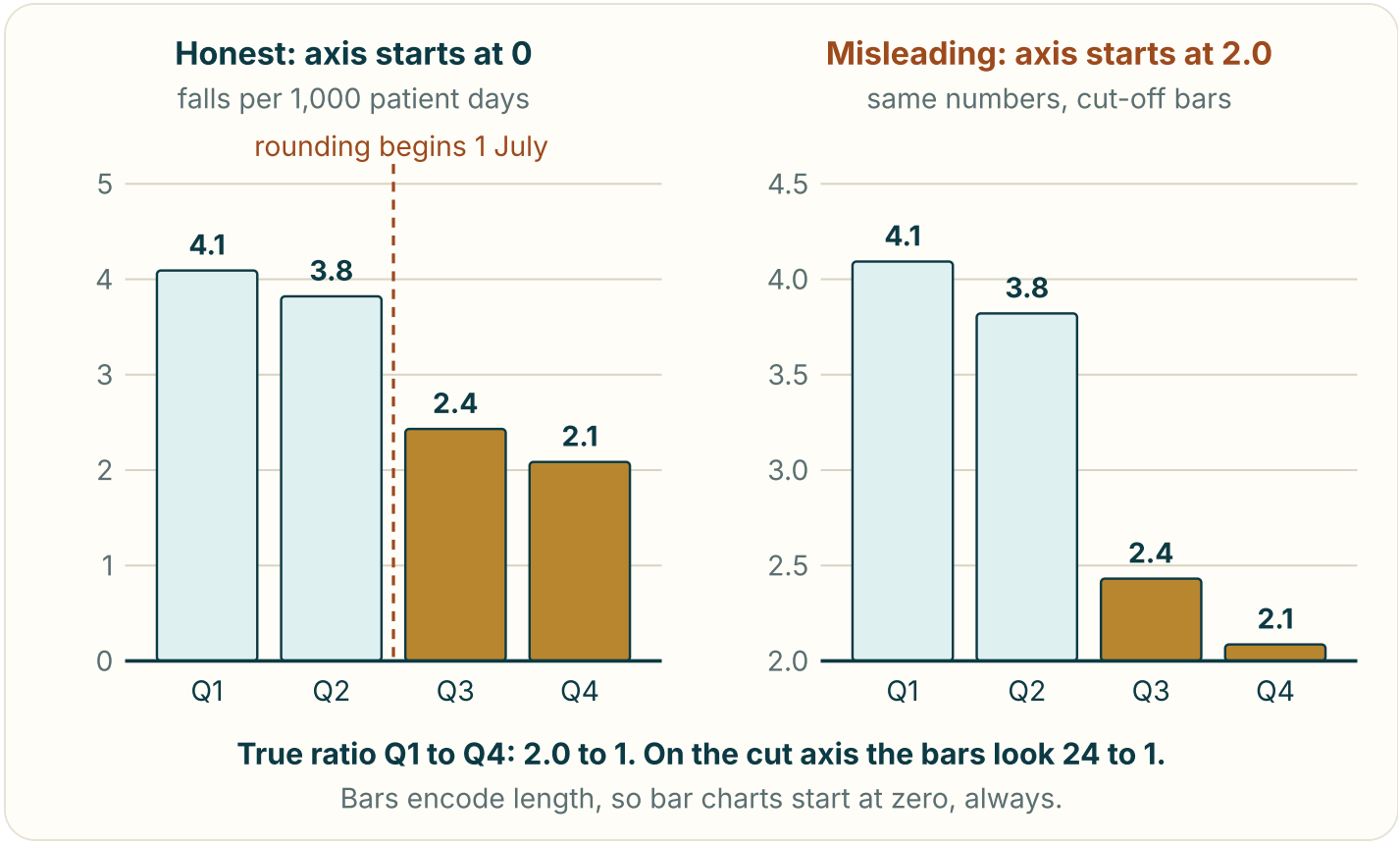
What to know

Write the one-sentence finding first; the display is the fastest proof of it. Use sentences for a few values, tables for lookup and exact comparison, charts for shape. Audience decides resolution, but caveats travel with the number.

Tables: cases in rows, variables in columns, units in headers, one rounding rule, real totals and a source line with an extraction date. Charts: name the comparison (trend, ranking, part-to-whole, distribution, relationship), encode with position or length, label directly and write assertive titles.

Audit yourself: bars start at zero, line baselines are contested, show enough history, supply denominators, avoid dual axes, separate percentage points from relative change and give counts when they are small. Attach visuals with a number, a callout, a caption and source, and alt text, and rehearse a thirty-second talk track.

> **LOCK THESE IN**
>
> - Write the one-sentence finding first; pass the four-second test.
> - Sentence for a few values, table for lookup, chart for shape.
> - Cases in rows, variables in columns, units in the header, one rounding rule.
> - Trend line, ranking sorted bars, part-to-whole stacked bar, distribution histogram, relationship scatter.
> - Encoding: position, length, angle, area, color. Label directly; assertive titles.
> - Bars start at zero; line baselines are contested; avoid dual axes; show enough history.



Same data, two baselines. Computed from the chapter's quarterly counts. With the axis cut at 2.0, a roughly two-to-one difference looks more than twenty-to-one.

Key terms and comparisons

Comparison	Use	Avoid
Trend over time	Line chart, time across	Bars for many time points
Ranking	Horizontal bars, sorted	Alphabetical order; pies
Part-to-whole	One stacked bar or % table	Pies past about four slices; 3-D
Distribution	Histogram or box plot	Reporting only the mean
Relationship	Scatter plot, one dot per unit	Two lines on twin axes

Worked cases

CASE 8.1 · AN OVERTIME SENTENCE

Overtime rose from 412 to 508 hours in one quarter. Write it as a sentence, since a chart of two values is decoration.

STEP 1 · COMPUTE

(508 − 412) ÷ 412 = 0.233, so **23 percent**.

STEP 2 · WRITE IT

"Overtime hours rose from 412 to 508 in one quarter, a 23 percent increase."

CHECK

Two values with no pattern to trace belong in prose.

TRAPS PEOPLE FALL INTO

- **Building the chart before the finding.** If you cannot write the sentence, you have a data set, not a finding.
- **A chart of two bars.** That is decoration. Two or three values belong in a sentence.
- **Alphabetical rows by default.** Order by time or by the column that carries the point.
- **False precision.** 2.4316109 from eight events claims what the data cannot support.

Chapter 8 self-test · six items

1. Which display fits ranking ten causes of supply delays?

A. Horizontal bars, sorted by size

B. A pie chart with ten slices

C. A line chart over ten months

D. A scatter plot of the causes

A. Horizontal bars, sorted by size Rankings read best as sorted bars.

2. Why are bubble charts scaled by diameter misleading?

A. Bubbles cannot show more than two values at once
B. Screen readers skip bubble charts entirely
C. Area grows with the square of the diameter
D. Bubbles must always start at a zero baseline

C. Area grows with the square of the diameter Four times the diameter is sixteen times the area.

3. What should a table's source line include besides the source?

A. The author's phone
B. The extraction date
C. The chart color key
D. The page count

B. The extraction date Live systems change; the date explains a mismatch later.

4. "90 percent of respondents agreed." What should travel with it?

A. A brighter color in the chart
B. The word significant
C. A second decimal place
D. The number who answered (n)

D. The number who answered (n) 90 percent of ten is not 90 percent of four hundred.

5. What should the word "significant" mean in a data report?

A. The statistical sense, or use another word
B. Any difference the writer finds interesting
C. A change of more than ten percent
D. A result shown in bold in the table

A. The statistical sense, or use another word Write substantial or marked if you mean large enough to matter.

6. Where should a figure be placed relative to its first mention?

A. Before it, so the reader sees it first
B. After it, as close as layout allows
C. At the end of the document, always
D. In a separate file sent alongside it

B. After it, as close as layout allows Repeat key numbers in prose if the figure and text cannot share a page.

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

Team documents die from no owner, the Frankendraft, silent disagreement and late reversal. Pick a model on purpose: single drafter, parallel drafting or layered drafting, each with a known failure mode. Below about 1,500 words, do not split the drafting.

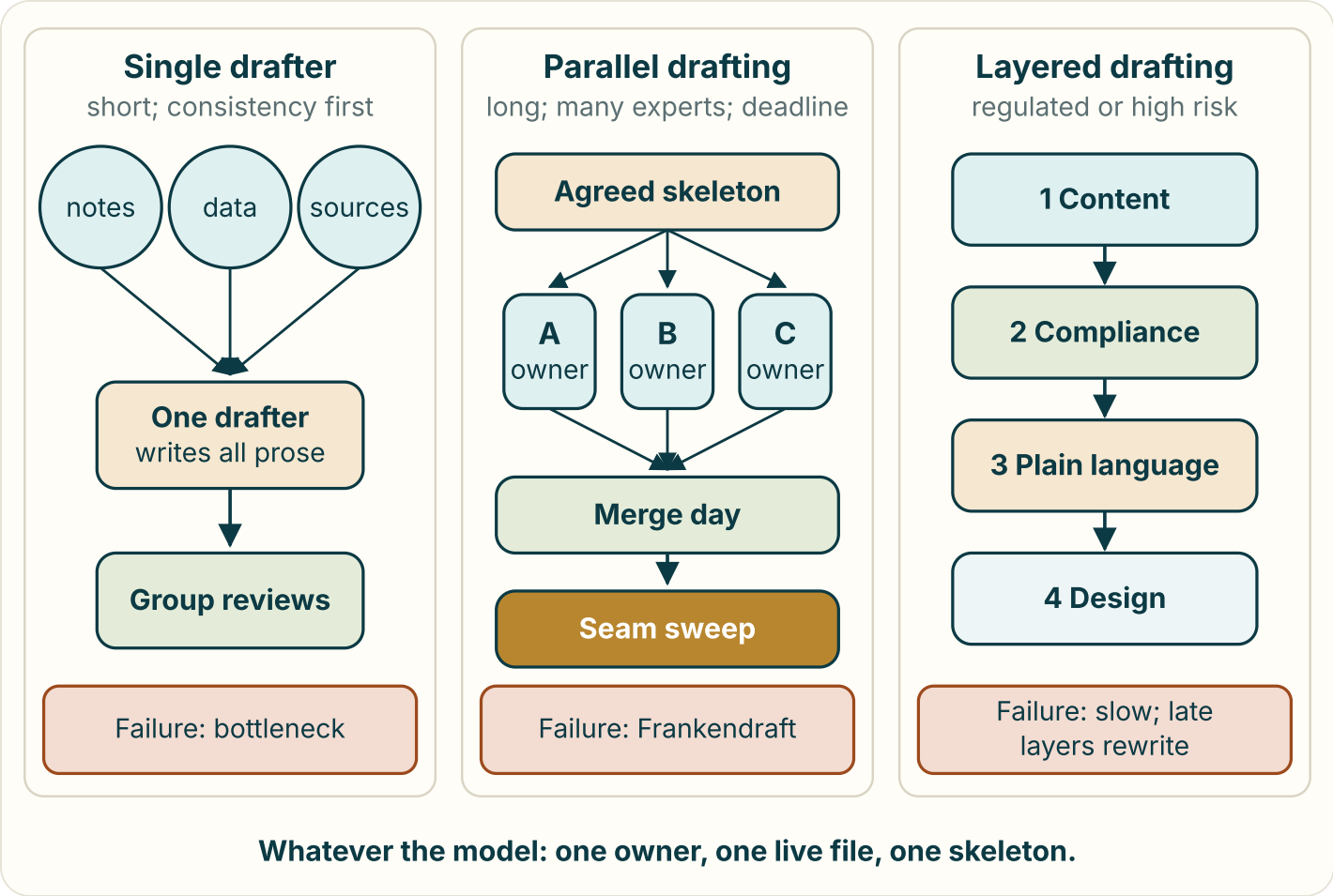
Write a one-page charter with a reply-by date, use RACI with exactly one accountable person, and agree a skeleton and a style sheet. Give contributors section briefs; after the merge, sweep the

seams for contradiction, redundancy and register shift.

Review in order: substantive, line, proof. Comments carry a problem, a location and a fix, and are marked blocking or optional. Keep one live file, version names that sort, sign-off tied to a version and date, honest credit (ICMJE criteria), and an explicit norm for AI assistance.

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.



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

Worked cases

CASE 9.1 · CHASING A SILENT APPROVER

Risk Management has not replied about v0.9 of a policy. Write the message.

STEP 1 · DEADLINE AND VERSION

"Please confirm approval of v0.9 by Friday 5 p.m."

STEP 2 · STATE THE DEFAULT

"If I do not hear from you, I will record that Risk Management reviewed and did not object to the regulatory language."

WHY

It converts an indefinite wait into a documented decision.

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.

Chapter 9 self-test · six items

1. Which model is safest for a regulated document where each pass needs a different specialty?

A. Single drafter
B. Parallel drafting
C. Live co-writing
D. Layered drafting

D. Layered drafting Content, compliance, plain language and design passes in a fixed order.

2. What is a Frankendraft?

A. A draft written entirely by one person over a weekend
B. A merged draft whose mismatched voices show the seams
C. A draft that has been through a red team review
D. A draft frozen at sign-off as a locked PDF file

B. A merged draft whose mismatched voices show the seams Nobody agreed on the reader, so each author wrote for a different one.

3. What does a style sheet record?

A. Local decisions: terms, must and should, numbers
B. The organization's full grammar guide with all rules
C. Each contributor's personal writing preferences
D. The color palette and fonts for the cover page

A. Local decisions: terms, must and should, numbers Ten to twenty rows turn recurring arguments into lookups.

4. Why should reviewers be given lanes?

A. Lanes let reviewers skip reading the document
B. Lanes make the document shorter in the end
C. Otherwise they spend attention on commas
D. Reviewers are not allowed to see other sections

C. Otherwise they spend attention on commas Protect specialists from work that will be overwritten.

5. What should you tell reviewers after revising?

A. What you accepted, what you declined and why, what is open
B. Nothing, since their comments are already in the file
C. That all comments were accepted, to keep things smooth
D. Only which comments you disagreed with and why

A. What you accepted, what you declined and why, what is open Reviewers who see their input tracked review the next draft properly.

6. Can a generative AI tool be listed as an author?

A. Yes, if it wrote more than half the text

B. Yes, as long as the team agrees to it

C. No; it cannot be accountable for it

D. Only for background sections of a report

C. No; it cannot be accountable for it A human answers for every sentence that ships.

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

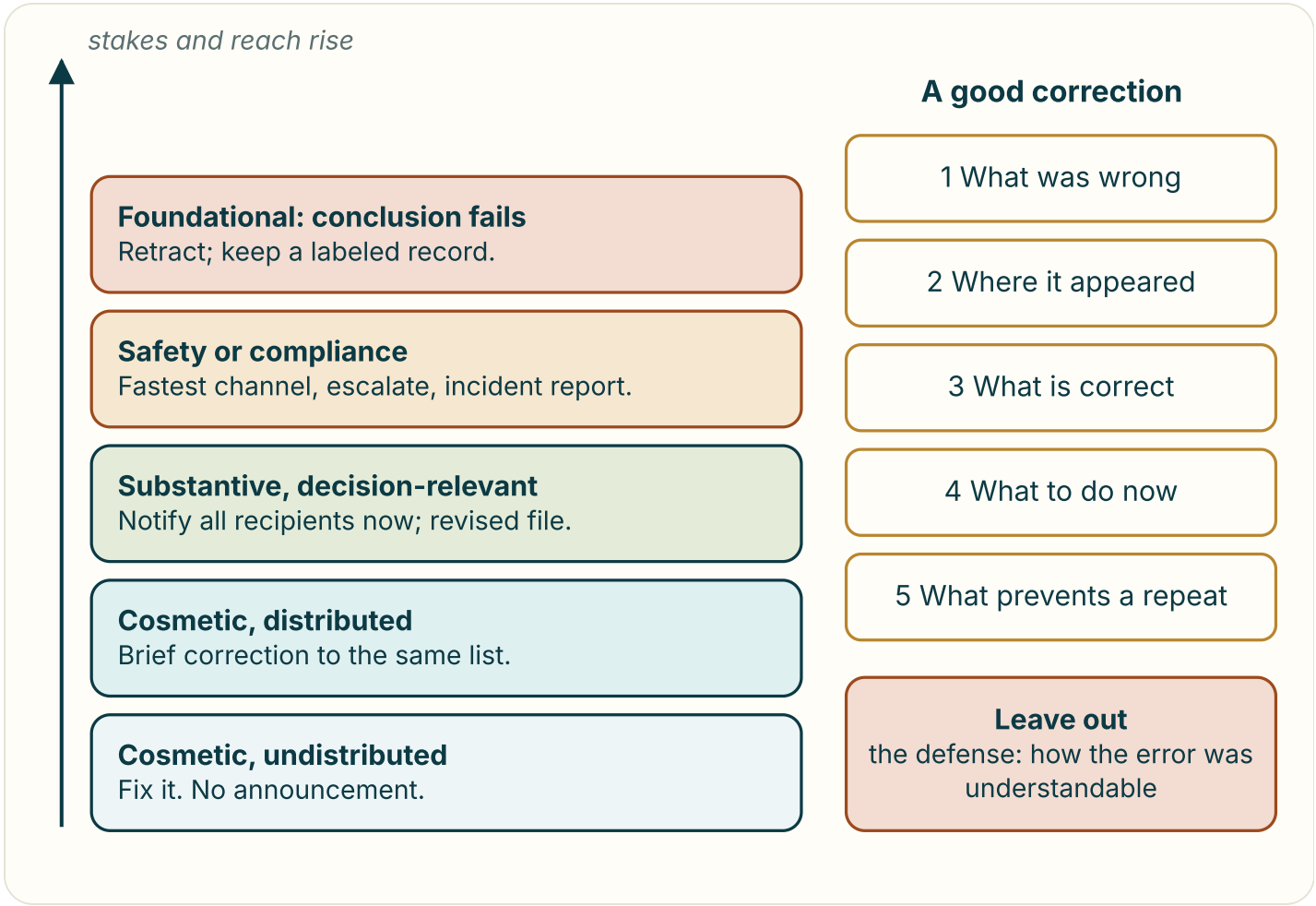
Sort claims by the proof they need: fact, estimate, inference, opinion, prediction. Check with lateral reading and SIFT, and remember a citation is not a check. Give numbers denominators, both absolute and relative frames, honest precision and a date.

Honesty is about the impression a fair reader forms. Watch for half-truths, material omissions and spin; calibrate verbs to evidence and hedge with named limitations. Credit, permission and original expression are separate duties; patchwriting is plagiarism; fair use is a four-factor test.

Include only what the purpose requires, de-identify to the safe-harbor standard, and treat channels and metadata as disclosures. Describe behavior, not character; avoid casual commitments, warranties and absolutes; preserve records once a hold attaches. Correct proportionately and without a defense, and escalate concerns with observation, standard, gap and ask.

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?



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

Worked cases

CASE 10.1 · A HALF-TRUE SENTENCE FIXED

A report says "Complaints are at a two-month low." They are also 30 percent above the same period last year.

STEP 1 · FIND THE MISSING COMPARISON

A cherry-picked window hides the year-over-year rise.

STEP 2 · REWRITE

"Complaints fell in the last two months but remain 30% above the same period last year."

TEST

Would a fair-minded reader now form a true impression? Yes.

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.

Chapter 10 self-test · six items

1. What is lateral reading?

A. Reading a source line by line from top to bottom
B. Leaving a source to see what others say about it
C. Reading only the headings of a long report
D. Comparing two drafts of your own document

B. Leaving a source to see what others say about it Skilled fact-checkers open other tabs almost immediately.

2. Which is the honest way to state an observational link?

A. More staff caused the higher satisfaction scores on the unit
B. Research proves that staffing drives patient satisfaction
C. More staff, higher scores; the data cannot show cause
D. It is arguably possible that staffing may perhaps matter

C. More staff, higher scores; the data cannot show cause One specific hedge beats four vague ones, and no causal verb outruns the evidence.

3. Which Creative Commons element requires sharing adaptations under the same terms?

A. BY
B. NC
C. ND
D. SA

D. SA BY requires attribution, NC restricts commercial use, SA is share-alike.

4. Which detail most needs removing from a teaching vignette?

A. The patient's wife is a nurse on our unit
B. The patient has an implanted cardiac device
C. The patient is an adult in their seventies
D. The patient was admitted after a fall

A. The patient's wife is a nurse on our unit It identifies the patient instantly to every coworker reading it.

5. What is puffery?

A. A specific promise of performance in writing
B. Vague sales enthusiasm, not a guarantee
C. A correction issued after an error spreads
D. A disclosure of a conflict of interest

B. Vague sales enthusiasm, not a guarantee "Best-in-class support" is puffery; "four-hour response" is a promise.

6. What did Cain, Loewenstein and Moore find about disclosing conflicts?

A. Disclosure can sometimes make advice worse
B. Disclosure always removes the conflict fully
C. Disclosure is never needed for small conflicts
D. Disclosure makes listeners overly suspicious

A. Disclosure can sometimes make advice worse Disclose early, but treat disclosure as a floor; recuse when the conflict is serious.

CHAPTER 11

Resumes, Cover Letters and Professional Identity

Read it in full: **Chapter 11 in the textbook**. Practice it in the lab: **The Bullet Forge** and **The Swap Test**.

What to know

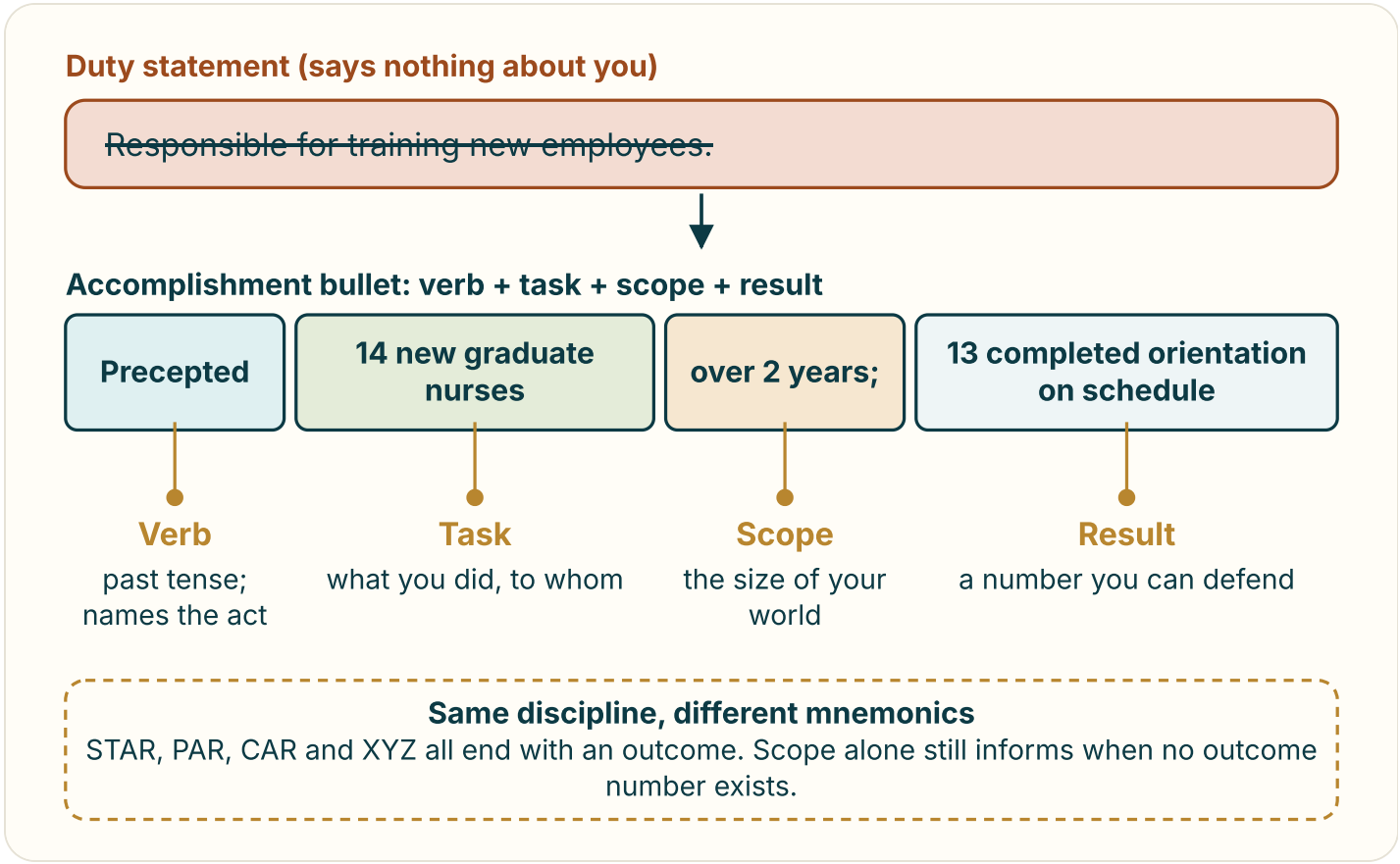
An application has three readers: the ATS that parses, the recruiter who searches and gates, and the hiring manager who weighs fit and risk. Decode the posting into a requirement-and-evidence table first, mirror its honest wording, and put the strongest material where the first scan lands.

Use reverse-chronological by default and hybrid for nonlinear paths; never hide the timeline. Lead with name, credentials in the right order, a headline and contact details in the body. Keep the file parse-safe. Turn duties into accomplishment bullets: verb, task, scope, result, with numbers you can defend.

The cover letter argues: a specific opening, two evidence paragraphs, and a close tied to this employer that passes the swap test. Stay one verifiable person across every document, brief your references, send a thank-you that adds something within 24 hours, and keep patients out of your packet.

LOCK THESE IN

- Three readers: ATS (parses), recruiter (searches and gates), hiring manager (fit and risk).
- Decode the posting into a requirement-and-evidence table before drafting.
- Reverse-chronological by default; hybrid for nonlinear paths; never hide the timeline.
- Top four lines: name, credentials, headline, contact. ANCC order: degree, licensure, state, national certification.
- Parse-safe: one column, contact in the body, standard headings, consistent dates.
- Bullet = verb + task + scope + result; only numbers you can defend out loud.



A duty becomes evidence. The rebuilt bullet uses the chapter's preceptor example: a verb, the task, the scope and a result you could defend if asked how you measured it.

Key terms and comparisons

Situation	Format	Section order that works
New graduate	Reverse-chronological	Contact, credentials, education, clinical experience, work, skills
Experienced, same field	Reverse-chronological	Contact, summary, licensure, experience, education, skills
Career changer	Hybrid	Contact, summary, relevant skills, full dated experience, education
Returning after a gap	Hybrid	Contact, summary naming the return, refresher, experience, education
Internal promotion	Reverse-chronological	Contact, summary, progression, projects, education
Academic or research	CV	Education, appointments, publications, grants, teaching, service

Worked cases

CASE 11.1 · FROM DUTY TO ACCOMPLISHMENT

Rewrite "Helped with inventory."

STEP 1 · REPLACE THE HIDING WORD

"Helped" becomes the verb for what you did: rebuilt.

STEP 2 · ADD SCOPE AND RESULT

"Rebuilt the par-level system for 240 supply items; eliminated 3 recurring stockouts and reduced expired-stock write-offs by roughly $4,000 a year."

CHECK

Could you explain how the $4,000 was measured if asked? If not, use a range or say it qualitatively.

TRAPS PEOPLE FALL INTO

- **Fearing the robot.** The ATS mostly files and searches. Worry about parsing, not auto-rejection myths.
- **Two-column templates.** Parsers read across the columns into word salad.

- **Contact details in the header.** They may never reach the record. Put them in the body.
- **A functional resume to hide a gap.** Recruiters recognize it. Name the gap in one clause instead.

Chapter 11 self-test · six items

1. What does the recruiter mainly do on the first pass?

A. Reduce a pile with keywords and gates
B. Read every cover letter closely for style
C. Judge long-term potential and culture fit
D. Call each reference before shortlisting

A. Reduce a pile with keywords and gates The hiring manager weighs fit; the recruiter builds a defensible shortlist.

2. Where should contact information go in a resume file?

A. In the page header region
B. In the page footer region
C. In a text box at the top
D. In the main body text

D. In the main body text Headers, footers and text boxes often fail to parse.

3. Which resume format is not interchangeable with a resume in the United States?

A. A hybrid resume
B. A curriculum vitae
C. A chronological resume
D. A functional resume

B. A curriculum vitae A CV lists publications, grants and teaching with no page limit.

4. Which verb opener does the chapter warn against?

A. Precepted for
B. Reconciled the
C. Responsible for
D. Audited all

C. Responsible for Empty openers demote you to a bystander.

5. A degree is not yet conferred. How should it appear?

A. As complete, since it soon will be
B. With "expected" and the date
C. Left off entirely until conferred
D. With only the university's name

B. With "expected" and the date Education verification returns "no degree conferred".

6. Is drafting a cover letter with an AI tool dishonest in itself?

A. No, but you own and must verify every claim
B. Yes, every use of AI tools is fraud
C. No, and the tool takes responsibility for facts
D. Yes, unless the employer is told the tool's name

A. No, but you own and must verify every claim Fabricated metrics or credentials are the line, whatever produced them.

CHAPTER 12

Digital and Social Professional Communication

Read it in full: **Chapter 12 in the textbook**. Practice it in the lab: **The Channel Dial** and **The Identifier Scrubber**.

What to know

Choose the channel by speed, reach, permanence, emotional weight and accountability. Urgency belongs to the channel that rings, not the word urgent. Write deadlines as dates and times; announcements of record go in email or the policy system.

In chat, send one complete message with the ask first and the link included; thread replies; spend mentions like money (4 seconds × 300 people = 20 minutes). Neutral text reads cold, so add a warm signal and state intent when it matters. In public, one concrete detail beats agreement; discussion posts need a claim that could be wrong, support and a question for a peer; make posts accessible.

Privacy follows the information: removing the name does not de-identify, so apply Safe Harbor thinking and the screenshot test, and assume permanence. Legal protection for workplace speech (NLRA Section 7, public-employee First Amendment analysis) is narrower and less predictable than many assume. Repair fast: plain corrections, real apologies, cooling moves, and leaving the channel when text stops helping.

> **LOCK THESE IN**
>
> - Pick the channel first: speed, reach, persistence, emotional weight, plus accountability.
> - Deadlines are a date and clock time; urgency is a property of the channel.
> - One complete chat message: ask first, link included, no lone "Hi".
> - Mentions are a budget: 4 seconds × 300 people = 20 minutes.
> - Neutral text reads cold: one warm signal, plus a statement of intent when critical.
> - Discussion posts: a claim that could be wrong, support, honest sources, a question for a peer.

Draft post (no name used)

So proud of **my team**[1]: we got the **motorcycle trauma**[2]
in **bed 4**[3] through six hours of surgery **tonight**[4]!

1 employer, via your profile
2 a unique characteristic
3 a location on a unit
4 a date element

No name appears, yet together these details point to one person. HIPAA Safe Harbor lists 18 identifier categories, including dates and any unique characteristic.

Safer version that keeps the meaning

Long night in the OR. Grateful to work with people who are still sharp at hour six.

Write about what you learned, never about who taught you the lesson.

No name, still identifiable. The chapter's example post marked identifier by identifier. Context, not names, re-identifies people.

Key terms and comparisons

Channel	Good for	Bad fit for
Email	Decisions, approvals, records, external contacts	Live back-and-forth, urgent alerts
Direct message	Quick clarification with one person	Anything the team or the future needs
Public chat channel	Team status, shared questions	Personnel matters, policy of record
Ticket system	Requests needing an owner and audit trail	Discussion and nuance
Phone or in person	Emotion, conflict, bad news, urgency	Detail you must recall exactly
Discussion board	Graded argument and peer response	Private questions for the instructor
Public social post	Visibility, sharing published work	Any specific patient, coworker or dispute

Worked cases

CASE 12.1 · A CORRECTION THAT LANDS

You posted that an in-service is Tuesday; it is Wednesday the 14th at 1400. Some staff already rescheduled.

STEP 1 · RIGHT INFORMATION FIRST, SAME PLACE

"Correction: the in-service is Wednesday the 14th at 1400, not Tuesday."

STEP 2 · BRIEF APOLOGY

"Sorry: please update your calendars."

STEP 3 · WHAT TO DO NOW

If anyone moved a shift for Tuesday, tell them how to undo it. Do not fix the original silently.

TRAPS PEOPLE FALL INTO

- **Typing URGENT into a scrolling channel.** If you need someone in five minutes, use the channel that rings.
- **"ASAP" and "end of day".** Each reader translates them differently. Write a date and a time.

- **"Quick question about the schedule."** That is the no-hello problem with a topic label. Ask the question.
- **Policy in chat.** It scrolls away. Announce in email or the policy system and point to it from chat.

Chapter 12 self-test · six items

1. Which channel suits a request that must survive vacations and reassignment?

A. A ticket with an owner and status
B. A direct message to one colleague
C. A post in a busy team channel
D. A phone call with no follow-up

A. A ticket with an owner and status Accountability is a structured field in a ticket.

2. What is wrong with "Need this by end of day"?

A. It is too specific for a chat message to a peer
B. End of day means different times to readers
C. It should be written in all capitals to be clear
D. It gives a reason the reader does not need

B. End of day means different times to readers Write a date and a clock time.

3. When should you post an answer to a channel after asking someone directly?

A. Never; direct answers should stay private
B. Only if the answer was hard to find
C. Only after a manager approves the post
D. When others will have the same question

D. When others will have the same question The next person finds it without interrupting anyone.

4. What should alt text include when an image contains words?

A. Only the file name of the image
B. A list of keywords for search
C. The words shown in the image
D. The date the photo was taken

C. The words shown in the image Alt text carries what a sighted reader takes from the image.

5. What is the screenshot test?

A. Imagining it out of context, read by four readers
B. Taking a picture of your screen before sending any message
C. Checking that images in a post load on a phone screen
D. Comparing a message with a template before sending it

A. Imagining it out of context, read by four readers The four readers are your manager, your board, the person described and a reporter.

6. Where should an apology for harm to one person go?

A. A public post to the whole channel
B. A private message to that person
C. An all-staff email from a manager
D. A comment under the original thread

B. A private message to that person Apologize where the harm happened; a public apology to one person makes them a spectacle.

CHAPTER 13

Writing in Healthcare: Documentation and Handoff

Read it in full: **Chapter 13 in the textbook**. Practice it in the lab: **The 2 a.m. Call: SBAR and I-PASS Composer** and **The Discharge Translator**.

What to know

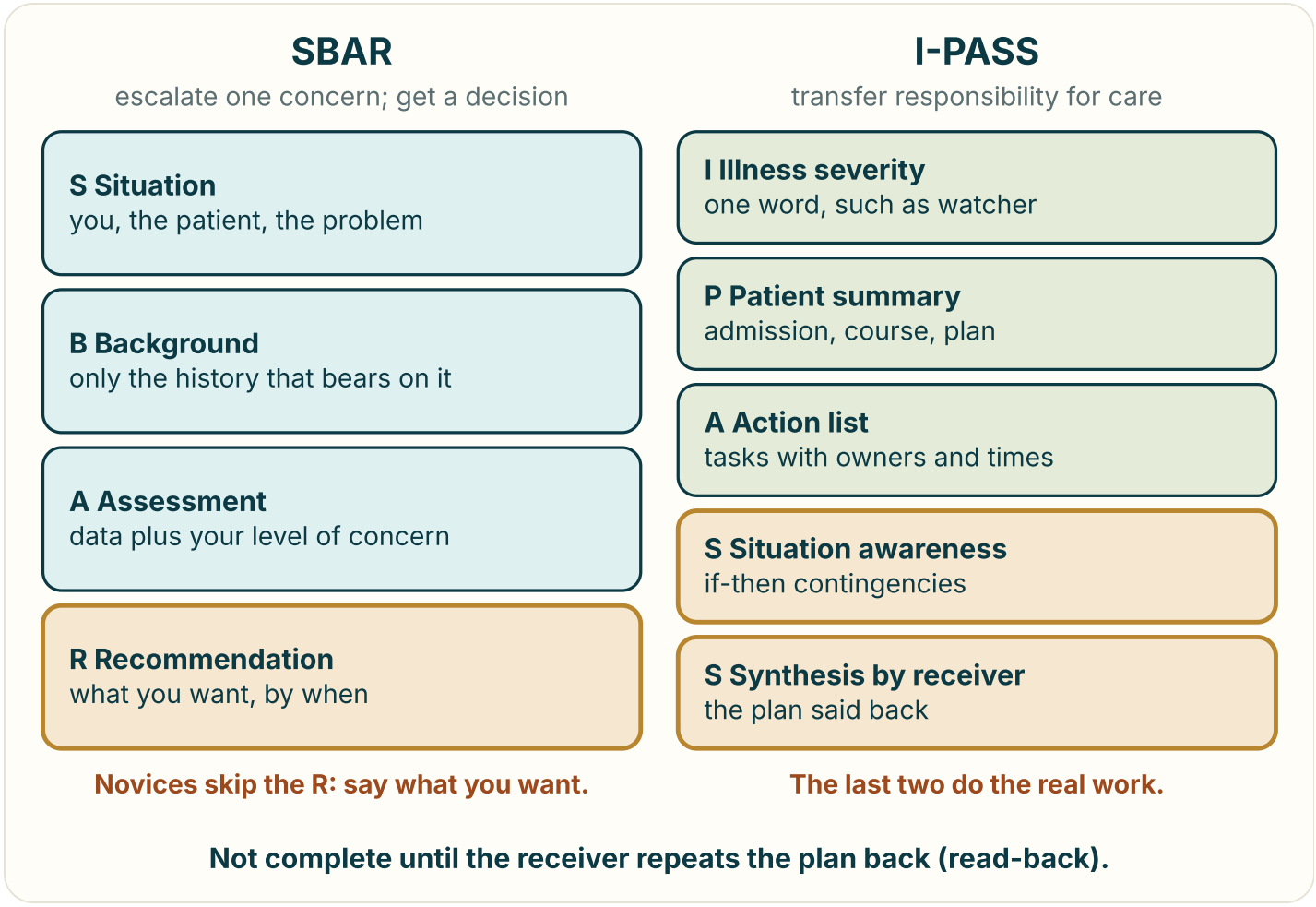
The chart has six readers across hours to years, and every entry answers four beats: observed, concluded, did, what happened next. It is evidence, made contemporaneously; undocumented care is hard to prove, and backfilling is falsification. The audit trail documents your documenting.

Choose the unit's format (SOAP, APSO, DAR, narrative, charting by exception) and fill it honestly; an assessment states what you think. Replace stigmatizing labels with behavior, time and number. Use SBAR to get a decision and I-PASS to transfer care, write contingencies as if-then thresholds, and finish with synthesis by receiver.

Correct openly with amendments and labeled late entries. Never write trailing zeros, always leading zeros, and avoid do-not-use abbreviations. Copy structure, not conclusions. Write knowing patients read their notes, make discharge instructions observable and numbered with teach-back, and keep incident reports out of the chart.

LOCK THESE IN

- Four beats: observed, concluded, did, what happened next.
- The chart is evidence; undocumented care is legally expensive, and backfilling is falsification.
- SOAP sorts by source; DAR follows one problem; charting by exception needs a defined standard.
- Replace labels with behavior, time and number; own your inferences.
- SBAR to get a decision (do not skip the R); I-PASS to transfer care.
- Contingencies are if-then thresholds; synthesis by receiver is read-back.



Two handoff structures, two jobs. SBAR gets a decision about one concern; I-PASS transfers responsibility. The gold rows are the ones novices most often skip.

Key terms and comparisons

Format	Structure	Best for
SOAP	Subjective, Objective, Assessment, Plan	Separating report from measurement
APSO	Same content, assessment and plan first	Readers who want the conclusion first
DAR / focus	Data, Action, Response	One problem through its intervention loop
PIE	Problem, Intervention, Evaluation	A close cousin of DAR
Narrative	Chronological prose	Flexible; poor for retrieval
Charting by exception	Only deviations from a defined normal	Fast; risky if normal is undefined

Worked cases

CASE 13.1 · DOCUMENTING EDUCATION

Replace "Patient verbalized understanding" after insulin teaching.

STEP 1 · CONTENT AND METHOD

"Reviewed sliding-scale insulin with patient and spouse using the printed chart."

STEP 2 · EVIDENCE

"Patient independently demonstrated drawing up 6 units and stated she would check her sugar before breakfast, lunch, dinner and bedtime."

STEP 3 · RESULT

"Teach-back correct on second attempt; written instructions and glucometer log provided."

TRAPS PEOPLE FALL INTO

- **Documenting findings but not your response.** The third and fourth beats are what protect the patient and you.
- **Backfilling the chart.** Charting care that did not occur is falsification. Label late entries instead.
- **"A: Pain."** That re-labels the data. State what you think is going on and what you ruled out.

- **Trait labels.** "Non-compliant" hides a solvable barrier and shapes how every later reader acts.

Chapter 13 self-test · six items

1. Which reader needs your reasoning, not just your data?

A. The consultant or covering provider
B. The quality and accreditation reviewer
C. The coder in revenue integrity
D. The pharmacy and dietary staff

A. The consultant or covering provider Lists of values with no assessment fail the covering clinician.

2. What does DAR stand for?

A. Diagnosis, Assessment, Result
B. Data, Action, Response
C. Data, Assessment, Review
D. Detail, Action, Record

B. Data, Action, Response Focus charting follows one problem through the intervention loop.

3. Where did SBAR originate before healthcare adapted it?

A. Commercial airline cockpit checklists
B. Hospital billing and coding offices
C. Emergency medical dispatch centers
D. U.S. Navy submarine communication

D. U.S. Navy submarine communication Kaiser Permanente adapted it; it is now in TeamSTEPPS.

4. What should you do about a colleague's inaccurate chart entry?

A. Edit their note so the record is correct
B. Delete the entry and re-enter it yourself
C. Chart what you saw; tell your supervisor
D. Add a comment inside their note disputing it

C. Chart what you saw; tell your supervisor Their entry is not yours to change.

5. Which abbreviation should be written out as "discontinue" or "discharge"?

A. mL
B. D/C
C. mcg
D. BMP

B. D/C D/C can mean opposite things.

6. How should a clinician treat open notes?

A. Stay honest; replace loaded labels with precise ones
B. Soften serious findings so the patient is not upset
C. Write less in notes since patients will read them
D. Hide the assessment in a section patients cannot see

A. Stay honest; replace loaded labels with precise ones Softening a serious finding is its own harm; precision and tone change, honesty does not.

CHAPTER 14

Editing, Review and Quality Control

Read it in full: **Chapter 14 in the textbook**. Practice it in the lab: **The Three-Pass Desk** and **The 20 Percent Cut**.

What to know

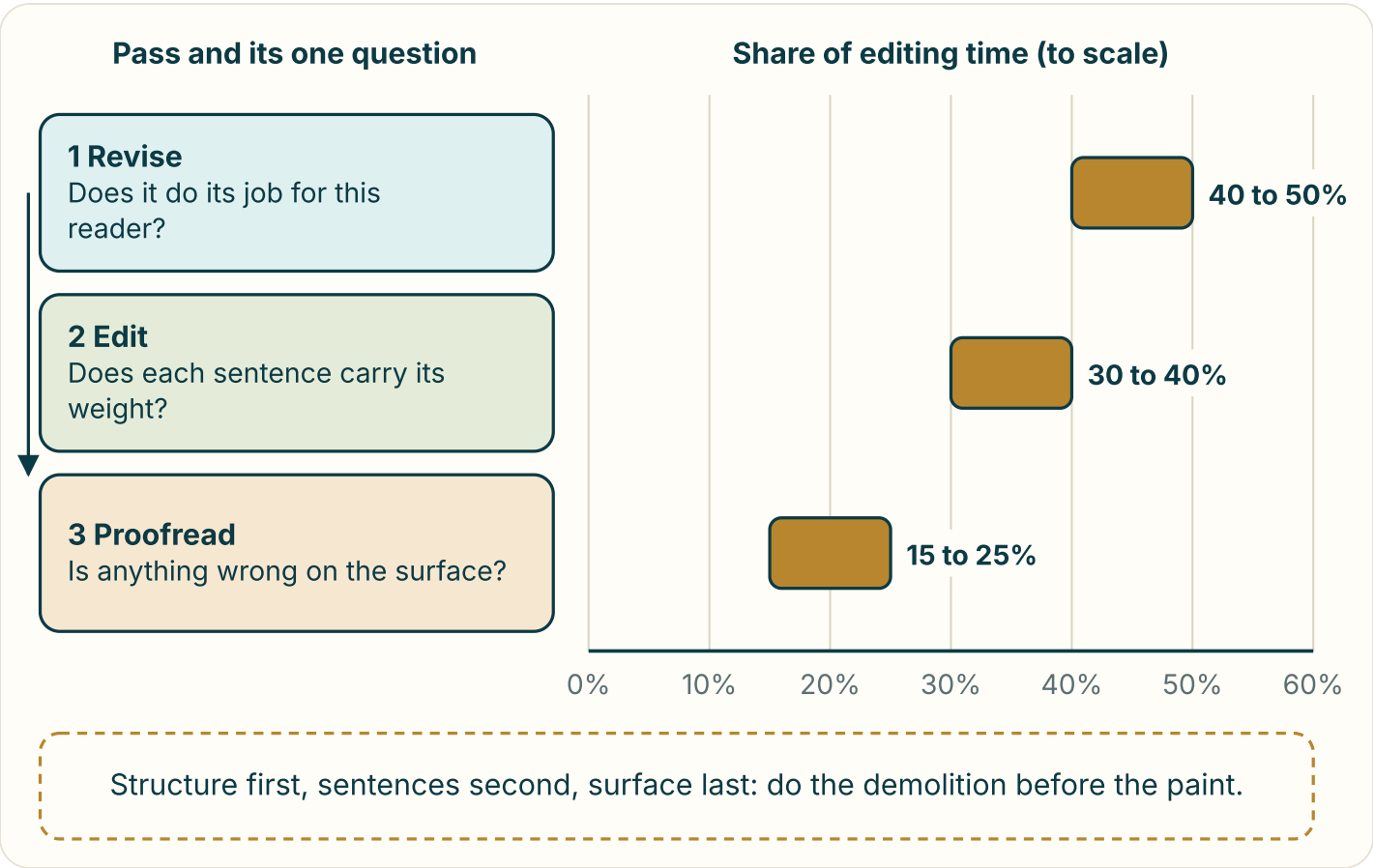
Edit in three passes by altitude: revise (does it do its job), edit (does each sentence carry weight), proofread (is the surface clean), roughly 40 to 50, 30 to 40 and 15 to 25 percent of the time. Decide the level of edit from stakes, audience and shelf life.

Edit sentences by subtraction and by verb: cut run-ups, swap phrases for words, undo nominalizations and expletives, use the passive only when the actor is unknown, irrelevant or obvious, and give each sentence one job. Aim to cut 20 percent with no fact lost. Direct reviewers with stage, ask and deadline; comment with location, problem and fix; treat confusion as data.

Verify high-risk elements against the source: numbers, names, dates, money, links, citations and identifiers, with unprimed double-checks, read-back and safe dose formatting. Build a quality system: style sheet, short binary checklist with killer items first, familiarity-breaking proofreading, date-first file names, written sign-off and superseded versions kept, not deleted.

LOCK THESE IN

- Three passes in order: revise (structure), edit (sentences), proofread (surface).
- Rough time shares: revise 40 to 50%, edit 30 to 40%, proofread 15 to 25%.
- Decide the level of edit from stakes, audience and shelf life.
- 20 percent rule: cut a fifth of the words and none of the facts.
- Passive is fine when the actor is unknown, irrelevant or obvious; not when accountability matters.
- Directed review: stage, ask, deadline. Comment: location, problem, fix.



Three passes, drawn to scale. The time ranges come from the chapter. Spend the most on structure, because polishing a paragraph you later delete is the most expensive error.

Key terms and comparisons

Pass	The one question	Deliberately ignore
1 Revise	Does this document do its job for this reader?	Grammar, word choice, commas, formatting
2 Edit	Does each sentence and paragraph carry its weight?	Whether the section belongs; typos
3 Proofread	Is anything wrong on the surface?	Meaning: you inspect, not read

Worked cases

CASE 14.1 · ONE SENTENCE, ONE JOB

Edit: "The report, which was submitted by the committee that had been formed in April, contains recommendations that we should give consideration to adopting."

STEP 1 · FIND THE TWO IDEAS

What the report recommends; what we should do about it.

STEP 2 · SPLIT AND UN-BURY

"The April committee's report recommends four changes. We should adopt two of them."

CHECK

23 words became 13, and the second sentence commits to a decision.

TRAPS PEOPLE FALL INTO

- **One crawling pass.** Fixing commas on page one spends attention you need for the structural problem on page four.
- **Editing an unstable structure.** Every sentence you polish may be deleted. Finish the argument first.
- **Treating passive as always wrong.** It is a normal construction; ask whether the reader needs the actor.
- **Writing to a readability score.** Choppy text can score well and teach nothing.

Chapter 14 self-test · six items

1. What is the order test in revising?

A. Does it run from what matters most to least?

B. Are the pages numbered in the right sequence?

C. Are the references in alphabetical order?

D. Do headings follow the order of the template?

A. Does it run from what matters most to least? Chronology is almost always the wrong order for a workplace document.

2. Why is proofreading your own writing hard?

A. Spellcheck hides errors in your own documents
B. You read what you meant, not what is there
C. Your own fonts are harder for you to read
D. You always proofread too slowly to notice

B. You read what you meant, not what is there Break familiarity with time, a new medium, text-to-speech or another reader.

3. What is a killer item on a checklist?

A. An item that is always skipped by tired staff
B. The final item, checked just before sending
C. An item that requires judgment to complete
D. The item whose omission causes the worst harm

D. The item whose omission causes the worst harm Put it first, where attention is highest.

4. Which is the best way to check a hyperlink before sending?

A. Look at the URL and confirm it seems right
B. Hover over it in your own email draft
C. Click it in a private browser window
D. Ask the recipient to tell you if it fails

C. Click it in a private browser window A link that works because you are logged in may fail for the reader.

5. Before sending a document outward, what should happen to tracked changes and comments?

A. Leave them in so readers see the history
B. Resolve all changes and delete comments
C. Hide them with the view settings only
D. Convert all comments into footnotes

B. Resolve all changes and delete comments Hidden tracked changes and stale comments leave organizations more often than anyone admits.

6. What does a sign-off record need?

A. Only the approver's signature on the final page
B. The names of everyone who commented on drafts
C. A list of every change made since version one
D. Who approved which version, when, covering what

D. Who approved which version, when, covering what Approval of clinical content is not approval of legal language.

ONE PAGE

Cram sheet

Every pattern, list and number in the course, sorted by exam. Cover the right column and rebuild each row. If a row will not come back, go to that chapter's exam guide.

Chapters 1 and 2 · Patterns to know

Pattern	The shape	Note
Action request	I need [who] to [do what] by [when] so that [consequence]	No deadline = suggestion; no name = nobody
Purpose statement	After reading this, [reader] will [action] by [date], because [reason]	Write it at the top; delete before sending
BLUF	First two sentences: what about, what you want, by when	From U.S. military staff writing
Subject line	Topic + action + date, distinguishing word first	Phone previews cut at about 40 to 60 characters
Full ask	Actor + action + date (+ consequence if late)	"No action needed" when nothing is
Bad news	One-sentence buffer, the news, brief reason, forward path	Reason after the news, not before
Apology	What happened, your part, correction, prevention	Follow risk policy for patient events
Follow-up	"Following up on my 3/2 request" + the ask + a new date	No "as I mentioned twice already"

Chapters 1 and 2 · Lists to know

List	Items
Four readers	Primary, gatekeeper, secondary, tertiary
Four jobs	Inform, request, persuade, record (plus keeping the relationship)
Channel variables	Complexity, speed or urgency, emotional load, need for a record
Constraints	Time, policy, privacy (HIPAA, FERPA), hierarchy, accessibility
PACT	Person, Aim, Constraints and channel, Test
Register dial	Distance, power, weight
Audience profile	Who acts, what they know, what is at stake, what they will object to, what they need to say yes
Email strengths	Asynchronous, precise, carries payload, timestamped record

Chapters 1 and 2 · Rules that are not formulas

Topic	The rule
Mixed audience	Body for the least technical reader who must act; depth in an attachment.
Adaptation	Change emphasis, vocabulary, depth; never the facts.
Channel	Bad news and negotiation to voice; the record to writing.
Three-reply rule	No decision by round three: call, then summarize by email.
Hedging	Soften the relationship, never the requirement or safety.
Records	Observed fact only; correct with a dated, attributed addendum.
Recipients	To acts, CC informed, BCC hidden; address last; trim forwards.
Ten-second test	A colleague must be able to say what you want and by when.

Chapters 3 and 4 · Numbers and dates to know

Item	Value	Note
Plain language standard	ISO 24495-1, 2023	Find, understand, use
New York plain contracts	Since 1978	Consumer contracts below a dollar threshold
Plain Writing Act	2010	Federal agencies; Federal Plain Language Guidelines
Health literacy survey	2003	About 1 in 8 proficient; about a third basic or below
Sarcasm study	Kruger and colleagues, 2005	Senders confident, recipients near chance
Sentence length	Average about 15 to 20 words, varied	Cutting pass loses 20 to 30%
Patient materials	Grade 6 to 8, a rule of thumb	Not a validated threshold
Measure and leading	45 to 75 characters; 1.15 to 1.5	About 66 characters as a target
Type	11 or 12 pt print; about 16 px screen	3 or 4 sizes, 2 typefaces at most
WCAG contrast	4.5 : 1 text; 3 : 1 large	Enhanced 7 : 1 and 4.5 : 1

Chapters 3 and 4 · Lists to know

List	Items
Placeholder verbs	occur, exist, take place, make, conduct, perform, provide, facilitate
Nominalization suffixes	-tion, -ment, -ance, -ence, -ity, -ure, -al
Do-not-use abbreviations	U, IU, QD, QOD, trailing zeros, abbreviated morphine and magnesium sulfate
Refusal moves	Acknowledge, decide, explain, offer, leave the door open
Five passes	Purpose, actors, cut, words, tone (then verify)
Design principles	Proximity, alignment, contrast, repetition
Accessibility habits	Real headings, alt text, meaningful link text, real table headers
Readability formulas	Flesch Reading Ease, Flesch-Kincaid, SMOG, Gunning Fog

Chapters 3 and 4 · Rules that are not formulas

Topic	The rule
Sentence engine	Actor in the subject slot, action in the verb slot.
Passive	Fine when the actor is unknown or irrelevant; fix when the actor is the point.
Jargon test	Replace it if you can without losing precision; otherwise define once.
Tone	One notch warmer; no irony; say no with the word no.
Form fit	Prose reasons, numbers sequence, bullets sets, tables compare.
Headings	Informative, parallel, no skipped level, no lone child.
Emphasis	One or two items a page; bold the risk; never color alone.
Scores	A smoke alarm, not a thermostat; test with a real reader.

Chapters 5 and 6 · Patterns to know

Pattern	The shape	Note
Memo header	TO, FROM, DATE, SUBJECT	TO responsible; cc informed
Memo opening	Decision or action in 30 words or fewer	Background in paragraph two
Action line	Who does what by when, how confirmed	Add a default clause if silence is fine
Letter order	Letterhead, date, inside address, salutation, body, close, signature, name and title, enclosure, cc	Block format: all flush left
Refusal	One buffer sentence, plain no, real reason, alternatives	Never leave the reader unsure
Analysis chain	Finding, conclusion, recommendation	Each traceable to the one before
Persuasion	Problem, cost, options, ask	Ask is most often missing
Proposal core	Problem, plan, qualifications, budget, schedule	Budget must match narrative

Chapters 5 and 6 · Numbers from the chapters

Item	Value	Note
Fall rate example (ch. 5)	6 in 750 days = 8.0; 2 in 780 = 2.6 per 1,000	Plus source and pull date
Call-light example	Median 6 min 40 s; 90th percentile 14 min 10 s	Standard 4 minutes; 2,240 calls
Fall rate example (ch. 6)	2.9 to 4.6 per 1,000 patient-days	14 falls, 4 injurious
Evening window	64% of falls 1900 to 2300	9 of 14
Rescreening	31% of 84 eligible cases	About 26 cases
Cost estimate	8 × $16,142 = $129,136	Plan costs $84,000
Proposal timing	Submit a complete version 48 hours early	Replace it if you improve it

Chapters 5 and 6 · Rules that are not formulas

Topic	The rule
Form choice	Inside or outside, signature needed, action or findings, stranger in a year.
Records	Channel decides retention; records are not yours to delete.
Incident reports	Observation not inference; kept out of the medical record; protection conditional.
Order	Direct for busy or receptive readers; indirect for skeptics; say which.
Summary test	A colleague who read only the summary knows what to do on Monday.
Sources	Primary in findings; secondary in background; vendor papers named as such.
Limitations	Name them first; they read as competence.
Compliance	Matrix on day one; the scorer's words, order and proportions.

Chapters 7 and 8 · Numbers and calculations

Item	Value or method	Note
Rate	count ÷ exposure × 1,000	Falls per 1,000 patient days
Chapter rates	4.1, 3.8, 2.4, 2.1; year 3.1	42 falls over 13,468 days
Percentage points	new % − old %	40 to 50 = 10 points
Relative change	(new − old) ÷ old	40 to 50 = 25%
Bubble by diameter	area grows with the square	4 × diameter = 16 × area
Color vision deficiency	About 8% of men, 0.5% of women	Mostly red-green
WCAG contrast	4.5 : 1 normal text; 3 : 1 large and graphics	Pale gray axis labels fail
Steps per stage	About 7 to 10 before a stage heading	One tester finds about a third of problems

Chapters 7 and 8 · Lists to know

List	Items
Five documents	Policy, procedure, work instruction, protocol, guideline
Before step 1	Title, purpose, scope, prerequisites, materials, time
Signal words	DANGER, WARNING, CAUTION (with symbol), NOTICE (without)
Hazard message	Hazard, consequence, avoidance
Hierarchy of controls	Elimination, substitution, engineering, administrative, PPE
Policy parts	Title and ID, purpose, scope, definitions, statements, responsibilities, exceptions, related documents, control block
Five comparisons	Trend, ranking, part-to-whole, distribution, relationship
Attaching a visual	Number and title, callout, caption with source, alt text

Chapters 7 and 8 · Rules that are not formulas

Topic	The rule
Steps	One imperative action; location before action; condition before command.
Branches	Two or more variables means a decision table with a cannot-follow row.
Warnings	Right before the step; never color alone; design the hazard out first.
Modals	Must, must not, should, may, will; define them; one owner per duty.
Tables	Cases in rows, variables in columns, units in the header, totals that sum.
Baselines	Bars at zero always; line baselines only when zero is meaningless and labeled.
Small numbers	Give counts and n; label error bars; "significant" only in the statistical sense.
Callouts	State the finding and cite by number, never "below".

Chapters 9 and 10 · 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

Chapters 9 and 10 · 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

Chapters 9 and 10 · 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.

Chapters 11 and 12 · Patterns to know

Pattern	The shape	Note
Resume top four lines	Name, credentials, headline, contact	City and state are enough
Credential order (ANCC)	Degree, licensure, state, national certification, awards	BSN, RN, CMSRN
Accomplishment bullet	Verb + task + scope + result	STAR, PAR, CAR, XYZ
Cover letter	Opening, two evidence paragraphs, fit and close	250 to 400 words, one page
Reference request	The job, what to speak to, a clear exit	Attach posting and resume
Chat message	Ask, context, deadline, link	One message
Public post	Concrete opening, example, lesson, invitation	First two lines earn the click
Apology	Act, impact, ownership, fix, stop	Never "if"

Chapters 11 and 12 · Numbers to know

Item	Value	Note
Resume type size	10 to 12 points; margins at least 0.5 inch	One readable typeface
Bullets per job	4 to 6 most relevant; 1 to 3 older	One or two lines each
Cover letter	250 to 400 words, 3 or 4 paragraphs	Never more than a page
Thank-you note	Within 24 hours	One paragraph that adds something
Six-second scan	From a commercial study	A metaphor, not a measurement
Broadcast math	4 s × 300 people = 20 minutes	Outages and safety only
Safe Harbor	18 identifier categories	Dates, small geography, full-face photos
Discussion post	About 180 defended words beats 400 of summary	Claim, support, source, question

Chapters 11 and 12 · Rules that are not formulas

Topic	The rule
ATS	Mostly a searchable filing cabinet; protect parsing.
Format	Reverse-chronological by default; hybrid for gaps; never hide dates.
Numbers	Only what you can defend in an interview; scope counts.
Identity	Official titles, month dates, "expected" degrees, honest lapses.
Channel	Speed, reach, permanence, emotion, accountability.
Tone	One warm signal; state intent; mirror senior people first.
Privacy	Screenshot test; deletion is not an event; write about the lesson.
Repair	Correct fast in the same place; leave the channel when text fails.

Chapters 13 and 14 · Structures to know

Structure	Parts	Use it for
Four beats	Observed, concluded, did, what happened next	Every chart entry
SOAP / APSO	Subjective, Objective, Assessment, Plan	Notes sorted by source
DAR	Data, Action, Response	One problem through its loop
SBAR	Situation, Background, Assessment, Recommendation	Escalating one concern
I-PASS	Illness severity, Patient summary, Action list, Situation awareness, Synthesis	Transferring care
Correction (paper)	Single line, reason, initials, date, time	Original stays legible
Three passes	Revise, edit, proofread	Every important document
Review comment	Location, problem, possible fix	Label blocking vs preference

Chapters 13 and 14 · Numbers to know

Item	Value	Note
I-PASS study (2014)	23% fewer errors; 30% fewer preventable adverse events	Nine pediatric sites; later results mixed
Copy-forward analysis	About 18% of note text typed by the author	The rest copied or imported
Cures Act access	Since April 2021	Narrow exceptions
Discharge reading level	About grade 6 to 8	Universal precaution
Dose format	1 mg, 0.5 mg	No trailing zero; always a leading zero
Edit time shares	40 to 50%, 30 to 40%, 15 to 25%	Revise, edit, proofread
20 percent rule	Keep at most 80% of the words	No fact lost
Checklist size	7 to 10 binary items	Killer items first

Chapters 13 and 14 · Rules that are not formulas

Topic	The rule
Records	Evidence, not diary; never backfill; label late entries.
Language	Behavior, time and number instead of labels; own your inferences.
Handoff	Not done until the receiver says it back.
Copy-forward	Copy structure, not conclusions; delete what you did not verify.
Safety reports	Facts only; never referenced in the chart.
Passive	Ask whether the reader needs the actor.
Verification	Against the source, unprimed, with read-back.
Versions	Date-first names; written sign-off; mark superseded, do not delete.

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