

## Quality Matters

### Representing Yourself, Your Organization, Your Profession



*As Benefit Specialists, our aim is to share complex information accurately and in a way that a non-expert can understand. It is not enough to know what information and resources are available, but it is essential to continually review how you present information to ensure accuracy and readability. Each individual you serve is unique in situation, questions posed, and information required - treat them as such and start each benefits reporting process with a fresh eye.*

*This following information, which was featured in the [December 2009 For Your Benefit Newsletter](#), features tips for some of the issues that were highlighted by the DVR workgroup, funders of benefits counseling, and you - the ben specs.*

*Check out these resources to enable you to best represent yourself, your organization, and your profession.*

## **Top 10 things to remember when writing a report:**

1. Stay consistent with your tense. Choose "you", "the individual" or "him/her" and stay consistent throughout your report. For whom is the report written?
2. Keep the information simple. Long run-on sentences are difficult to understand and read. Watch out for too much repetitiveness.
3. Don't assume the BPQY is accurate! Always review the information and compare it to what you know. Follow-up with Social Security as needed.
4. Always include the individual's work goal. Write the report to support the person's employment path. How will the person use the IRWE? Why does this person need to know about the Trial Work Period?
5. Avoid using templates as much as possible. Make sure the information in the report is updated. Not just something cut and pasted from an old report! Remember, the report is for an individual who is different from everyone else you have served.
6. Verify *all* benefits. People don't always know what benefits they have. Also, sometimes people are receiving benefits for which they are not eligible.
7. Include information in the report about benefits the person is eligible for but not receiving.
8. Include contact information for other agencies and resources.
9. Review your report! Read the sections out loud. What parts are difficult to read? Does it make sense?
10. Accuracy! The person you write the report for is not likely to know what information is accurate and what information is inaccurate. Benefits specialists wouldn't exist if the information were easy to understand. **Verify what you know! Have someone else review it!**

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## Readability Tips

The National Institute for Literacy estimates that 20% to 30% of adults in the U.S. lack the basic literacy skills necessary to carry out basic daily tasks, such as reading an electric bill or understanding a prescription's side effects. Therefore, it is critical that important benefit information be written in a manner that addresses the needs and increases the accessibility of information for low literacy audiences.

The following information provides tips on how to improve information readability and comprehension for low literacy audiences:

### **Use active voice:**

The subject of your sentence should act, instead of being acted upon. "We will ask you about your benefits" is active, while "You will be asked questions about your benefits" is passive.

### **Write in the first-person**

Use pronouns, such as "I", "we" and "you." This promotes the use of active voice and will likely be clearer and more attractive to the reader.

### **Keep sentences short and to the point:**

1. Break up sentences whenever possible.
2. Try to vary sentence length.

### **Limit paragraphs to one main idea:**

Make sure that the topic sentence is clear and states the focus of the paragraph.

### **Use clear headings:**

1. Ensure that the headings are meaningful and illustrate the content of different sections.
2. Keep headings close to the text they introduce.

### **Consider the needs of your audience:**

1. Section off critical information.
2. Use concrete examples to illustrate key points.
3. Repeat information.
4. If you use new or unfamiliar words, explain the word in lay terms whenever possible.

5. Use positive statements.

**Organize the document so that key information is clear and easy to locate:**

1. Lead in with the most important and essential information, and sequence the information in a logical and easy-to-follow order.
2. Underline or bold headings.
3. Avoid justified margins, multiple fonts, and entire sentences in all caps, italics or bold.
4. Avoid over-using bold, italics or underline in multiple blocks of text.
5. Use bulleted lists whenever possible or numerical lists if the beneficiary is required to understand the information in a sequence.

**Utilize white space:**

1. Break up text by using liberal white space between paragraphs and headings.
2. Avoid manipulating margins to force text onto one page.

**Proofreading your document:**

1. Reading your document out loud is the best way to locate errors and assess the overall flow and clarity of your document.
2. Whenever feasible, try setting aside your document for a day or two before proofreading again. This is an excellent way to locate errors that you may have overlooked the day before.

**Ask others to read or edit your document:**

1. Ask someone who is unfamiliar with the subject matter, as such a person is more likely to discover unclear text.
2. Look over other documents and assess how similar documents are constructed and written.

**Activate readability statistics in Microsoft Office WORD:**

**WORD 2003**

To activate readability statistics in Microsoft Office WORD 2003 perform the following steps:

1. Click on Tools.
2. Under Tools click on Options.
3. Under Options click on the Spelling and Grammar tab.

4. Under the Spelling and Grammar tab click on Show Readability Statistics.
5. Run Spell Check.

### **WORD 2007**

1. Click the Microsoft Office Button, and then click Word Options.
2. Click Proofing.
3. Make sure Check grammar with spelling is selected.
4. When correcting grammar in Word, select the Show readability statistics check box.

### **Note:**

1. Once you have you have activated the readability statistics you can also assess particular sections of text by highlighting part of document and running spell check.
2. The easiest way to lower the reading level of your document is to remove or reduce the number of multisyllabic words and break up sentences into small, more manageable parts.

## Spelling, Grammar, and Punctuation

Back to the basics: spelling, grammar and punctuation. We learn about each of these things in the very beginning of our school careers, but sometimes we overlook the importance of these basic building blocks of language.

Having incorrect spelling, grammar or punctuation adds to the difficulty of the already complex material we have to share. Having these errors in a document can also give the impression that the work was done without care or in a hurry. Let's take a minute to revisit each of these areas...

### Spelling

A word can be misspelled in one of two ways:

1. It can be misspelled so that it does not represent any words in the English language. (For example: "people" could be misspelled as "poeple"), or
2. It can be the correct spelling of the wrong word. (For example: "write" when you really mean "right").

Misspelling a word so it does not correctly spell any English word can be easily corrected. Spell check functions on word processors and dictionaries are great resources for correcting those words that you mistype or you just aren't sure how to spell.

<http://www.merriam-webster.com/>

<http://dictionary.reference.com/>

Using a wrong word (that is spelled correctly) is a different issue.

Often times, problems can occur with homophones. A homophone is a word that is pronounced the same as another word, but has a different meaning. Homophones may or may not be spelled the same. Some examples include:

1. to, too, and two.
2. there, their, and they're.
3. left (opposite of right) or left (past tense of leave).

Be sure that you are using the correct spelling (and meaning) of the word when you are using it. This is another good time to pull out that dictionary!

Another common error is mistyping a word and ending up with a correctly spelled wrong word. For example:

1. Food *panties* – instead of *pantries*.
2. *sues* – instead of *uses*.
3. open to the *pubic* – instead of *public*.

Spell check isn't going to catch those words that are "wrong" but spelled right. It is always important to take the time to edit your work. This is also an example of why it is helpful and important to have someone else check your work.

## **Grammar**

According to Dictionary.com, grammar is defined as: "the study of the way the sentences of a language are constructed." It is important to follow the rules of grammar so that what you are writing is easy to read and understand. Again, the information that we are presenting to people is very difficult to begin with. You don't want to make that even more difficult to understand with poorly constructed sentences.

Some great online resources for grammar rules and information are:

1. Grammar Girl - <http://grammar.quickanddirtytips.com/>
2. GrammarBook - <http://www.grammarbook.com/>
3. Daily Grammar - <http://www.dailygrammar.com/>
4. Grammar Slammer - <http://www.englishplus.com/grammar/>

## **Passive Voice**

Writing a sentence in the active voice is usually preferable to using the passive voice. In a sentence with the active voice, the subject performs the action; in the passive voice, the subject is not the actor but is instead acted upon.

- An example of a sentence in the passive voice is: The report was given to Priscilla by Ed.
- The active voice version of the same expression is: Ed gave Priscilla the report.

The passive voice form is wordy taking eight words and sounds awkward and complicated; the active voice version with five words is simpler and sounds more natural. In a short example such as this one, use of the active voice improves the sentence. In longer sentences the difference is normally even more evident.

- In some passive voice sentences a writer can easily omit essential information: The change must be reported as quickly as possible.

- Who must report the change? Important information is missing and needs to be included: You must report the change as quickly as possible.

Another example of the passive voice is introductory phrases such as “The issue was raised as to...” or “The question was asked as to...” These phrases make sentences not only wordy but also unclear; they do not tell who raised the issue or who asked the question.

### Dangling Modifiers

Dangling and misplaced modifiers can cause confusion or even change the meaning of a sentence. Consider the following:

**Example:** After completing an application and submitting your birth certificate, a Claims Representative will process your claim.

The sentence is stating that a Claims Representative will complete an application and submit your birth certificate because the phrase beginning “After completing...” modifies “a Claims Representative.” The sentence should be:

**Example:** After you file an application and submit your birth certificate, a Claims Representative will process your claim.

A writer needs to make clear to whom or what a modifying word refers.

### Conditional Sentences

In benefits analysis reports we often use conditional sentences that begin with “if” to explain what will happen depending on a person’s situation. For example:

**Example:** If you earn more than \$700 in a month, that month will count as one of your nine Trial Work Period months.

We have to be careful in using conditional sentences. For example, a sentence that has more than one conditional or “if” statement can be confusing:

**Example:** If your earned income goes over the SGA level, your benefits will stop if you have completed your Extended Period of Eligibility and if you have used your grace period already.

Similarly, presenting a list of possibilities after an “if” statement can be hard for a reader to keep straight and understand.

Example: If you earn more than SGA, your benefits will stop, then you can request EXR and get provisional payments, or you can reapply for benefits

Short, simple, and direct sentences make a report easier to read and understand.

### **Punctuation**

Having inaccurate punctuation can make reading a document more difficult. It can even change the meaning of a sentence.

Some useful resources for information about punctuation are:

1. GrammarBook - [http://www.grammarbook.com/english\\_rules.asp](http://www.grammarbook.com/english_rules.asp)
2. Grammar Slammer - <http://www.englishplus.com/grammar/punccont.htm>
3. The Writing Center - <http://www.unc.edu/depts/wcweb/handouts/commas.html>

**Remember:** It is always important to edit your work! The best way to catch errors in spelling, grammar or punctuation is to carefully review what you have written and have someone else look over your work. Don't be afraid to use your resources to answer questions about each of these areas, and write on!

## Formatting and Style

Reports come in many different shapes and sizes. Each one is different, but there are some overlapping things all reports should have. Good formatting and style are essential elements in reports. To make your reports easier to read, check out the following tips:

### **Include White Space on the Page**

- You can do this by increasing font size to at least 1 ½ the size of your font. Watch this short video to see how it is done in Microsoft Word 2003.
- Include white space in your margins. Generally, the standard is 1 – 2 inches all around the page.
- Separate paragraphs with white space.
- Make sure you have a single-column report.
- Use bulleted lists when appropriate.
- Avoid long and dense paragraphs. Break the information up into smaller chunks that are easier to view.
- Use headers to separate information.

### **Highlighting Important Information**

- Stay consistent throughout the report.
- Use bolding and italicize sparingly. Too much emphasis distracts from the point you are trying to make.
- Avoid whole paragraphs in bold or italics. This is often difficult for the reader to follow.
- Use text boxes or bullets to emphasize information.
- Remember that some colors are difficult for folks to see. Use color sparingly or not at all.

### **Fonts, Size, and Style**

- Use sans serif fonts. These are recommended because they are often easier for folks to read. Sans serif fonts include Tahoma, Verdana and Arial.
- Avoid changing sizes of your font. This can add confusion in the report.

### **Calculations in Reports**

- Remember to check your math!
- Use tables to align numbers. View this short video to see how it is done using Microsoft Word 2003.
- Include recognizable signs ( $\div$ ,  $\times$ ,  $+$   $=$ ) to show what the actions are.

When you are working with someone who has a visual impairment or a diagnosis of blindness, don't forget to ask them what method they use to read the information. Be careful using color and include as much contrast as possible. When in doubt, always ask. Find free brail services in your community or provide the report on a disc or in an email so the person can use a screen reader.

### **Additional Tips**

- Include page numbers.
- Make an outline before you start.
- Organize topics into groups.
- Always have someone review your work for errors and accuracy.

## Consumer Meeting Tips 101

The report is not the only part of the service we offer. How we present our reports and share the information is also a crucial part of the process.

When it comes to meeting your consumer for the first time, you want to put your “best self” forward and begin to develop a good relationship. Here are some tips you may want to consider:

- **Be on time.** Make sure to arrive at least 5 to 10 minutes before the meeting starts.
- **Avoid wearing** any heavily scented lotions, perfumes or colognes.
- **Illustrate good listening skills.** Answer all questions clearly. If you are not sure what the correct response is to a question let the consumer know you will get back to them and then do so as soon as possible after the meeting!
- Don't be afraid to ask the consumer for clarification if you do not understand his or her question.
- Don't interrupt the consumer by responding to a question before he or she is finished.
- Show interest in what your consumer has to say.
- **Provide all options to the consumer.** Remember our role is not to tell the consumer what to do, but to provide them with information to make educated decisions that are right for them.
- Last, but certainly not least, **always call your consumer back promptly** when he or she leaves a message.

## Resources

### Grammar

Grammar Girl - <http://grammar.quickanddirtytips.com/>

GrammarBook - <http://www.grammarbook.com/>

Daily Grammar - <http://www.dailygrammar.com/>

Grammar Slammer - <http://www.englishplus.com/grammar/>

### Spelling

Dictionary.com - [www.dictionary.com](http://www.dictionary.com)

Merriam Webster Dictionary - <http://www.merriam-webster.com/dictionary>

### Track Changes

Track Changes and Comments in Microsoft Word -

<http://www.unc.edu/depts/wcweb/handouts/comments.html>

**Clear, Concise and Direct Sentences (from UW-Madison Writing Center)**

<http://writing.wisc.edu/Handbook/ClearConciseSentences.html>