

Instructions, Procedures, and Policies

INSTRUCTIONS VERSUS PROCEDURES

Procedures provide general guidelines for performing a task, while instructions provide specific, detailed steps. Procedures—or general guidelines—will be appropriate for some situations, while instructions may be necessary for readers who need detailed directions to perform a job task or process.

Instructions and procedures can appear in several formats: in letters and memoranda (see Chapter 7 for an example instructional memo), in reports, in technical papers or notes, in stand-alone documents to accompany mechanisms or processes, or in complete manuals. Complex procedures and instructions usually appear as manuals, which use many of the report elements exemplified in the formal report in Appendix C. E-mail is not a suitable method of sending instructions/procedures, unless you send these as an e-mail attachment (in a standard rtf, doc, docx, or pdf file) that can be printed or read on the receiver's computer screen. Differences in e-mail applications can produce awkwardly formatted, unreadable text.

CRITICAL ROLE OF INSTRUCTIONS AND PROCEDURES IN THE WORKPLACE

Instructions and procedures often carry heavy legal liability. Because instructions are written for those who need them, most new products and processes have instructions attached. Instructions may also appear on a website, but many of these do not exhibit the qualities of good instructions. When a product fails because

instructions lack clarity, completeness, and/or adequate warnings, the manufacturing company can be held responsible for costs incurred from buyers who, in good faith, attempted to follow the instructions. Even worse, when a customer or an employee dies or suffers major injuries because instructions did not provide complete, readable information and safety warnings, the company can be liable for the injuries or death. Companies that sell products that have hard-to-follow instructions on products that must be installed or assembled by the purchasers can lose money on the product when purchasers return the product. Conversely, well-written instructions can improve the image of a company that manufactures products. Many companies will provide onsite, face-to-face instructions for individuals who will have to operate equipment after it is installed. Face-to-face instructions plus written instructions can help purchasers feel confident in the company that sells the equipment. In short, well-designed, clear, complete, accurate instructions can become good sales documents while preventing lawsuits if equipment or products are misused because users did not/could not follow the instructions.

Quick Tips

Many people resist reading instructions. They try to figure out for themselves how to operate a product or perform a task and will turn to the instructions only if all their efforts fail. When they do read the instructions, they want to understand everything immediately without having to read anything twice. A simple design, plain wording, and clear illustrations will be critical to encouraging readers to pay attention to your instructions or procedures:

1. Use concise headings and subheadings to describe and highlight each section.
2. Leave plenty of white space around headings.
3. Use numbers for every step in a chronological process; use bullets for lists of conditions, materials, and equipment.
4. Use white space to make items in lists easy to find and read.
5. Highlight safety information and warnings. Distinguish between danger, warning, and caution.
6. Keep illustrations as simple as possible.
7. Locate illustrations at the point where the reader needs them. Don't expect readers to locate an illustration that is several pages away from the instruction to which it pertains.
8. Label every illustration, and at the appropriate point in the related text, write "See Figure X."
9. Do not begin an instruction at the bottom of one page and complete it at the top of the next page. Insert a "page break" and move the entire instruction to the next page.

PLANNING INSTRUCTIONS AND PROCEDURES

Instructions and procedures should enable those who need them to perform the tasks covered. Successful instructions and procedures can be easily read, easily understood, and correctly followed by the intended users with minimal difficulty. Understanding your target readers and, in some cases, the context in which the documents will be used is paramount. If readers are confused or misled by statements, they can hold the company liable for injury or financial damage suffered because of poorly written instructions or procedures. Instructions, particularly those that involve processes that could be hazardous, should explain the knowledge level required of the target audience.

Who are the readers? What do your readers know about the subject? These questions will determine how much information you provide and the type of language you use. The audience for instructions should be specified, especially if readers not conforming to that audience should not attempt to follow the instructions. For general instructions, remember that many people resist reading instructions. They tend to avoid reading them, if possible, and attempt to perform the task without them. When they do read the instructions, they want to understand them immediately without having to reread them. Design features (layout), format, choice of language, and use of visuals can be critical to encouraging readers to focus on the instructions or procedures.

What is your purpose? Successful instructions/procedures require that both you and your readers know your purpose. What should your readers know and be able to do after they read these instructions/procedures? Any information that isn't applicable should be omitted.

What is the context in which the instructions/procedures will be used? Knowing how documents will be read can help you design effective documents. Readers may be focusing on them while they are sitting at their desks. They may need to read the entire document before trying to perform the task, or they may perform the task as they go.

Do your readers need to read the instructions/procedures before they begin? Your telling them how to read the instructions may be necessary. For example, you can include detailed instructions for first-time readers, and then have a summary of steps for readers to use once they are familiar with the longer instructions. Context-sensitive instructions can be found in numerous settings:

- Some sailboards have instructions for how to right the sailboard—if it turns over in the water—on the bottom of the boat where riders can see the instructions if the boat turns over.
- “Quick Start” instructions for many hand-held devices can be found inside the top or lid of the device.

- Some products, such as bookcases, computers, and lamps, for example, come with instructions composed only of pictures to show the steps in assembling the product. However, if the product will be sold in other countries, “picture-only” instructions should be tested for interpretation.
- Instructions used in machine shops and on manufacturing floors are often printed in large type on eye-saver yellow or green paper and laminated to resist grease. These instructions may be in metal loose-leaf notebooks so strong that pages cannot be torn out. Or they may appear on computer screens projected along the assembly line. Again, readability, completeness, and accuracy of these screens can be critical to error avoidance and safety of employees.
- Basic operation instructions and troubleshooting information for large clocks can be found inside the clock mechanism access compartment. These are designed to accompany the booklet that contains detailed instructions.

Will the instructions be available online or in paper? If instructions will be available online, focus on readability of the material. Avoid “text heavy” and lengthy instructions. Partition your instructions into distinct sections hyperlinked in a logical way. Or, you may want to tell your readers immediately that they should print a copy of the instructions if they are too long and complex for online reading.

Planning is particularly critical for writing instructions or procedures. Remembering or even using the document analysis checklist at the end of this chapter will help you determine whether you need instructions or procedures, the delivery medium (online or paper), the content you will include, and any design strategies that could help you produce an effective document. Effective instructions require sensitive attention to readers’ information needs, their current knowledge of the topic, and what you want them to know as a result of reading the instructions.

STRUCTURE AND ORGANIZATION

First, analyze the audience, purpose, and context; then, begin to structure your procedures/instructions. Examine the following general guide for what elements to include, but remember that what you decide to include will depend on your topic, your audience, your purpose, and the reader’s context. Comprehensive instruction/procedure manuals will usually contain most of these elements, while shorter instructions/procedures may require fewer. To illustrate instructions, we will focus on three examples.

Introduction. The introduction should familiarize readers with the task to be performed: specifically, what the instructions will allow readers to do and what skill level the person should have to perform the task successfully.

Theory governing the procedure or instruction. For some types of procedures, readers will perform tasks better if they have a general overview of the process. Knowledge of the process may help them understand when they have made

an error and how to avoid errors. If you are going to give instructions for operating a mechanism, some explanation of the value and purpose of the mechanism can prepare readers for the process.

Warnings, cautions, hazards, and notes regarding safety or quality. Given the wide variety of technologically complicated and potentially dangerous products available today, you really cannot “overwarn” readers. And a failure to warn could have costly legal implications for your organization. Any level of hazard needs to be described—what will happen and why—if a particular action is performed. Identify the hazard, followed by the reason or the result, and be sure that all warnings, cautions, and notes are clearly visible. Warnings may also be repeated if they are associated with a particular step or direction. Warnings given at the beginning alert readers to possible problems they may encounter. Be sure that warnings stand out so that readers’ eyes are drawn to them. The American National Standards Institute (www.ansi.org) articulates standards for hazard statements. A review of research on hazard messages is available from the U.S. Occupational Safety and Health Administration (www.osha.gov).

Conditions under which the task should be performed. Some instructions, particularly laboratory instructions, may require you to describe the physical conditions required to perform a task: room size, temperature, time required for the entire process and for individual steps, specific safety processes. If time is a constraint, readers need to know how much time will be needed before they begin the task.

Name of each step. For each step, give the following: purpose of the step; warnings, cautions, and notes; any conditions necessary for performing the step; time required to perform the step; and the list of materials needed for the step.

- Place instructions in chronological order.
- Number each step.
- Limit each instruction to one action.
- After you have written the instruction, state in a separate sentence the reason for the instruction, but only if you believe that the reader may not follow the instruction without an explanation. Include warnings whenever necessary. And be sure to explain all warnings if you believe that people will not understand the reason for the warning.

Case 10-1: Process Instructions

Stefi Lee, a graduate student who supervises a biochemistry lab, decides that the laboratory instructions for recrystallization are too confusing and decides to revise these before assigning the lab. The original instructions appear in Case Document 10-1a. She will expect students to read the original instructions but also to have the revision available when they actually begin the experiment. Her first step in revising is to do a pre-writing analysis:

Pre-writing Analysis for Revising Recrystallization Instructions

1. Who is/are your reader(s)?

My readers are students new to Organic Chemistry lab. Those enrolled in this course will be required to recrystallize and perform certain tasks in lab they have never done before.

2. What is your reader profile? Background, attitude toward following instructions?

These students have not been previously exposed to Organic Chemistry Lab experiments. They know only basic knowledge from General Chemistry Lab, which does not teach the techniques and methods required in Organic Chemistry Lab. They will have no idea what equipment they will be using nor what each piece of equipment will look like. The only equipment they will have a general idea of are beaker, Erlenmeyer flask, and spatula. They will be totally reliant on the instructions through the entire experiment and won't be able to perform the experiment by memory until they repeat it with the instructions several times. The students want the instructions to be simple and easy to learn, so they understand the general purpose and procedures of the experiment.

3. How much do your readers know about the subject?

The readers don't know anything about this subject because lab experiments in Organic Chemistry Lab are much more advanced and different from General Chemistry Lab.

4. Will you have to define any terms that your readers may not understand?

Yes, some equipment and chemical terms will need to be defined.

5. What do you want your readers to be able to do after reading the instructions or procedures?

I want my readers to fully understand the experiment and be able to learn the steps by memory after following the procedures a few times. After learning to perform the experiment correctly, my readers should know the purpose and intent of the experiment.

6. What is the situation that led to the need for these instructions?

In my first semester of Organic Chemistry lab, I was very confused in lab. The lab manual did not provide very clear instructions on how to set up the equipment. Thus, I performed the experiment very inefficiently and didn't obtain the correct results in the end. The instructions were condensed in long paragraphs, and oftentimes I would lose my place in the procedures. After I finished the experiment, I had no idea what I had done and the purpose of the lab.

7. How will your readers use these instructions? Will they need to read every time, or will they be used only for reference?

My readers will follow these instructions carefully the first few times. They will need to use them several more times until they are able to commit every step of the experiment to memory. Thereafter, they will be able to perform the experiment themselves.

8. What kinds of pictorials will you use?

Graphics of the equipment used and results of the experiment will be provided.

9. What kinds of formatting and page design strategies will you use to make the instructions easy to read?

I will bold headings, provide bullet points, use white space to make the steps easy to see and follow, and underline important steps.

10. What content segments will you include?

I will include descriptive segments for equipments used, personal safety wear for self-protection, experiment procedures, and clean-up procedures.

CASE DOCUMENT 10-1A

Recrystallization

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Recrystallization

Purpose: To demonstrate the use of recrystallization to purify an impure sample of a solid compound.

Reading: *Techniques:* Recrystallization
Techniques: Melting Points

INTRODUCTION

Organic chemistry tends to be an almost endless adventure into isolation, identification, and/or synthesis of new compounds. Unfortunately, organic compounds have a unique sense of humor and reactions tend never to go to completion. Even if all the starting material has been used, it is a very good bet that more than one product has been formed. Recrystallization is one of four major techniques used to separate and purify organic compounds. Unlike the other techniques, recrystallization requires that the material to be purified be solid.

EXPERIMENTAL PROCEDURE

As soon as you arrive in the laboratory, begin heating 75 mL of water in a 250-mL beaker.

Dissolving the Compound. Weigh approximately 1.5 g of the impure acetanilide into a 125-mL Erlenmeyer flask. Break up the larger lumps with a stirring rod and add a boiling chip to the flask. Add about 25 mL of hot water to the flask containing the impure acetanilide. Heat this mixture on the steam bath. Swirl the flask occasionally (using crucible tongs) to aid in dissolving the solid and to prevent bumping. When recrystallizing an impure solid, it is desirable to use the minimum amount of hot solvent to dissolve the solid (30 mL of hot water are required to dissolve 1.5 g of pure acetanilide). Add small portions of hot water, 1 to 2 mL, until all the acetanilide dissolves. Be careful not to add too much hot water. The impure acetanilide contains water insoluble impurities. If no more material dissolves after you add more hot water, the material left is the insoluble impurity. If the acetanilide forms an oil rather than dissolving, more hot water should be added to dissolve the oil. Be careful not to add too much water.

Filtering Insoluble Impurities. While you are dissolving the acetanilide in hot water, set up a filter flask and a Büchner funnel for a hot vacuum filtration. (The steps required are outlined in *Techniques: Recrystallization*) Then conduct a hot vacuum filtration to remove insoluble impurities.

continued

Recrystallizing the Acetanilide. After completion of the hot vacuum filtration, allow the hot solution to cool slowly. If the solution is cooled too rapidly, small impure crystals form. Notice if an oil forms as the solution cools. If oil droplets are observed, heat the solution until the oil dissolves, add about 5 mL of water, and allow the solution to again cool slowly. After crystallization seems complete (the flask will have cooled to the point that you can comfortably hold it), place the solution in an ice-water bath for about ten minutes to increase the recovery of acetanilide.

Isolating and Drying the Pure Acetanilide. Vacuum filter the ice-cold solution to collect the crystals of acetanilide. Be sure the Büchner funnel is clean if it was used in the hot filtration. Wash the crystals with about 5 mL of ice cold water. The crystals in the funnel will still be quite wet. They should be dried thoroughly before weighing or taking a melting point. Some water may be removed by pressing on the crystals with a spatula while air is being drawn through the funnel by the aspirator. After the crystals have been dried, remove the filter paper and crystals from the Büchner funnel. Place another piece of filter paper on top of the crystals and wrap well in a piece of 15-cm filter paper. Tape with a piece of colored tape as a label. Label the sample with your name, section and course number, and experiment number. Store the sample in your section's storage drawer until the next laboratory period.

The sample of pure acetanilide will be thoroughly dry by the next laboratory period. Weigh the recovered acetanilide and determine its melting point. Compare this weight to the amount of impure acetanilide and determine the percent recovery. Compare the melting point range to the melting point of pure acetanilide reported in the literature.

CLEAN-UP PROCEDURES

The filtrate in the filter flask at the end of the experiment should be poured into the appropriately labeled waste container in the hood. Dispose of the used filter paper in the waste container labeled for this purpose in the hood. Rinse the used equipment with acetone, collect and dispose of the first rinse in the container labeled for this purpose in the hood.

Second Week Lab Period Clean-up Procedures. After you have weighed and determined the melting point of your acetanilide sample, dispose of the acetanilide in the container marked "waste acetanilide." You will also put the filter paper used to store the crystals in this same container. The used melting point capillary tubes should be disposed of in the box designated for broken glass.

SAFETY

Acetanilide is an irritant, avoid getting this on your hands. Wash your hands immediately following contact. You will be using *HOT* water. Use clamps to secure your filter flask to avoid tipping and unnecessary exposure to hot liquids or the acetanilide. Clamps may also be necessary to prevent your flask from tipping over while it is being chilled in the ice-water bath.

Following her analysis of the original lab instructions, Stefi revises the original instructions (see Case Document 10-1b).

CASE DOCUMENT 10-1B

Recrystallization

Step-by-step instructions for carefully and correctly performing Recrystallization.

Recrystallization is a technique used to separate and purify organic¹ compounds from liquid to solid matter.

Before starting this experiment, think safety! These chemicals could be hazardous to your skin and eyes.

For Safety:

- Keep your safety goggles on *at all times*.
- Tie back long hair.
- Wear closed-toe shoes.
- Wear gloves if needed.
- Do not consume any food, drinks, or chemicals during lab.
- Do not wear loose clothing.

Equipment Required:

Check off items ☒ as you collect these before you begin.

- | | |
|--|---|
| ☐ 250-mL Beaker | ☐ Crucible Tongs |
| ☐ 125-mL Erlenmeyer Flask | ☐ Filter Flask |
| ☐ Stirring Rod | ☐ Buchner Funnel |
| ☐ Boiling Chip | ☐ Black Tube |
| ☐ Steam Bath | ☐ Filter Paper |
| ☐ Clamp | ☐ Watch Glass |
| ☐ Rubber FilterVac | |

Chemicals used:

- ☐ Water
- ☐ Acetanilide²

¹ Organic—relating to chemical compounds containing carbon, especially hydrocarbons.

² Acetanilide—a white, crystalline, odorless, organic powder, C_8H_9NO , produced by the action of glacial acetic acid on aniline, used chiefly in organic synthesis and formerly in the treatment of fever and headache.

Conducting the Experiment

This experiment requires five steps:

1. Dissolving the compound,
2. Using the balance,
3. Setting up the hot vacuum filtration apparatus,
4. Recrystallizing the acetanilide, and,
5. Cleaning up following the procedure

1. Dissolving the compound

1. Using a graduated cylinder, measure 75 mL of water and add it to a 250 mL beaker.
2. Set the beaker on the cylindrical steam bath on your laboratory desk and turn the red knob at the side of your desk to begin heating.
3. While your water is heating, use the balance to weigh approximately 1.5 g of impure acetanilide (Impure acetanilide can be found in a bottle at the front counter). Use a watch glass to accurately weigh the impure acetanilide.

2. Using the balance

1. Obtain a watch glass from your instructor and set it on the balance. Figure 1 is an example of a watch glass.
2. Tare³ the balance by pushing the "tare" button so that the watch glass has a mass of 0.0 grams.
3. Then using a spatula, carefully add impure acetanilide onto the watch glass until the balance reads approximately 1.5 grams. Then add the impure acetanilide to the 125-mL Erlenmeyer flask.
4. Break up the clumps of acetanilide with a stirring rod and add a black boiling chip (found at the front counter) to the flask.
5. Add approximately 25 mL of the heated water from the beaker into the flask containing the impure acetanilide.
6. Using crucible⁴ tongs, swirl the flask occasionally to prevent clumping. Crucible tongs will protect you from burning your hands. Never pick up hot objects with your hands.

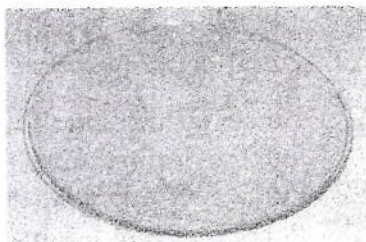


Figure 1-Watch Glass

³ Tare—to obtain the weight of a container or wrapper that is deducted from the gross weight to obtain net weight.

⁴ Crucible—metal or refractory material employed for heating substances to high temperatures.

7. If all the acetanilide has not dissolved by this step, add 1-2 mL portions of hot water until it dissolves.
8. While the acetanilide is dissolving, set up the hot vacuum filtration apparatus.

3. Setting up the hot vacuum filtration apparatus

1. Obtain a Buchner funnel and a filter flask from your instructor. Figure 2 is an example of how your funnel may look, and Figure 3 is an example of a filter flask.
2. Obtain a clamp from your lab drawer and securely clamp the filter flask to the metal frame connected to your desk.
3. Obtain a rubber FilterVac from your lab drawer and place it on top of your Filter flask. Figure 4 is an example of what your FilterVac may look like. Then place the Buchner funnel on top of the FilterVac.
4. Obtain a black long tube from your lower lab drawer. Attach one side of the heavy-walled tube to the side-arm of your flask and the other side to the water aspirator. Figure 5 is a representation of how your entire set-up should look.
5. Obtain a small filter paper and neatly fit it into the Buchner funnel so that it covers all the holes at the bottom of the funnel. Wet the filter paper with 1-2 drops of distilled water. Then turn the water aspirator (green knob) on full blast by turning it all the way to the left. The suction pressure from the water aspirator should suck the filter paper to the bottom of the funnel.
6. At this time, slowly cool the hot solution in the flask by turning down the red knob every few minutes.
7. If oil droplets form, turn up the red knob and heat the solution until the oil dissolves. Then, add about 5 mL of water and allow the solution to cool again slowly. If oil droplets appear again, repeat this step.



Figure 2-Buchner funnel

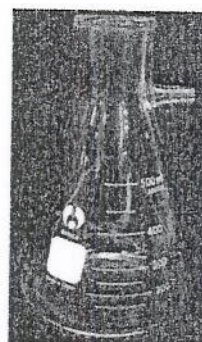


Figure 3-Filter flask

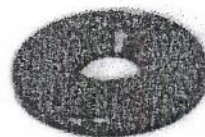


Figure 4-FilterVac

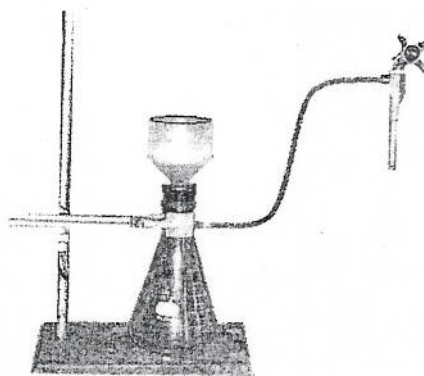


Figure 5-Hot Vacuum Filtration Set-up

continued

8. When white clumps begin forming in the flask (sign of crystallization), the solution is ready to be filtered through the Buchner funnel.

4. Recrystallizing the acetanilide

1. With the water aspirator on full blast, vacuum filter the solution by slowly pouring the contents of the flask into the Buchner funnel.
2. Once all your contents are poured, rinse the flask with hot water and pour it into the funnel again. This filtration should produce white crystals that look similar to baby powder.
3. Pour 5 mL of ice cold water into the funnel to wash the crystals formed.
4. Use a spatula to remove the boiling chip and press on the crystals to remove water.

Note: Do NOT turn off the water aspirator until you are ready to clean up!!!

5. After the crystals have dried, carefully dump and wrap the crystals in a 15-cm filter paper. Tape and label the filter paper with your name and section number. Store it in your lab section drawer for next week. By this time, the crystals will be fully dry.

5. Cleaning up following the procedure

1. Do not turn off the water aspirator until the black tube is disconnected from the sidearm of the flask. If water is turned off before the tube is disconnected, water may back up into the freshly cleaned solution and you will have to start over.
2. Pour the filtrate⁵ in the filter flask into the waste bottle in the hood at the end of the experiment.
3. Dispose of the small filter paper that was used to filter the solution into the waste container.
4. Carefully take apart the vacuum filtration set-up and wash the equipment thoroughly with acetone in the sink. Return all equipment used to your instructor.

⁵ Filtrate—liquid that has been passed through a filter.

Case 10-2: Job Instructions

These procedures were written by an employee who had just completed several years as a Runner/Floater at an animal hospital. Before she left, she decided to write a set of instructions for the next person who would take her place. Job procedures have become increasingly important in many organizations. These help the organization in writing job descriptions, training new employees, and evaluating employee performance.

CASE DOCUMENT 10-2

How to Be a Runner at Kingsland Animal Clinic

Congratulations! You have the job! You will now need to learn how to perform your job. These instructions will tell you what you will need to do here at the clinic. Keep these instructions close by until you know all the tasks you will need to perform.

Your First Day

You will be training most of your first day. Read these instructions before you arrive, then observe, listen, and practice. Make notes on the instructions to help you remember what to do.

As you learn the job, you will see other ways that you can help. Always ask questions. The better all employees work as a team, the better service and care the clinic can provide. Every person employed at the clinic has an important job. The Runner's tasks, as you will see, prevent gaps in service and care and improve efficiency.

What the Runner/Floater Does

As the runner/floater, you will experience all aspects of a working veterinary clinic: reception, technical, kennel cleaning, pharmacy, and any other job that the clinic does. If someone needs your help, respond to them immediately. The RF position exists to make everyone's job easier and more efficient.

IMPORTANT: Realize that other employees do not always know when they need help, or they do not want to bother you by asking for it. Learn to know when someone needs you. Take initiative. If someone is having trouble, offer to help. Communicate openly with the receptionists, technicians, and vets to find where you are needed at any given time. Don't be afraid to ask questions about where and how you can help.

continued

CAUTION: Since you will work with animals, remember that sick animals are often frightened. Remain alert and aware of your surroundings. Treat all animals with caution. Just because an owner tells you that her Chihuahua is a "sweetie" doesn't mean that it won't try to bite you when you take its temperature.

Your Responsibilities—Discussed in These Instructions

- Knowing the Phone Room
- Helping the Receptionists
- Helping the Technicians
- Completing End of Day Duties
- Working on Other Tasks When You Have Time

The Phone Room

If you are assigned to the phone room, when one of the receptionists is at lunch, or if no one is in the phone room, **answer the phone**. A receptionist will teach you to work the phone.

- Greet callers with "This is [insert your name] at Kingsland Animal Clinic. How can I help you?"
- Always have a note pad ready to write down owner name, animal names, or any other important information.

Most common calls you will receive:

1. **Make an Appointment.** Use the Cornerstone program on the computer in the phone room to make an appointment. A receptionist will show you how to work Cornerstone. Practice using the program so that you don't make mistakes.
2. **Make a Boarding Reservation.** The boarding book should always remain in the phone room, on one of the desks. Write the owner's last name under the requested dates in pencil. If the reservation changes, you can easily erase.
3. **Ask about the Status of a Pet.** If the owner dropped off a pet for any reason, the owner may call to find out how the animal is doing. Put the owner on hold; run to the back; and ask the techs: "Does anyone know if [pet name] is ready to go" or "[pet name]'s owner wants to know how he/she is doing. Does anyone know?" When you find out, run to the phone and relay the information.
4. **Ask about Prices.** The price book, like the boarding book, is located in the phone room. This book lists prices for common procedures, surgeries, details, etc. You may put the client on hold for a moment as you find the information.

continued

5. **Ask a Pet Health Question.** Transfer the caller to the phone in the tech station. Put the caller on hold and first make sure a tech can take the call, then transfer the caller. If no tech is free, get the caller's information and tell them a tech will call shortly. Pull the file, and put it in the Drop Off Box with a note attached. Describe question clearly.
6. **Refill Medication.** Simply transfer the caller to the pharmacy station. Check first to make sure someone is available in pharmacy.
7. **Other.** Many calls do not fit into these categories. If you do not know the answer, put the caller on hold and find someone who does know the answer. Any employee will be glad to answer your questions.

NOTE: Make sure to "roll the phones over" when the clinic closes so that no more calls come in.

Helping the Receptionists

The receptionists should never leave the front desk vacant. Your job: make sure they do not leave unless someone else takes their places. You must constantly run between the reception area and the back of the clinic to relay information from the receptionists to the vets and to retrieve animals. This requirement describes the "runner" part of your job. You will keep the receptionists from leaving by doing the following tasks for them:

- When a client drops off a pet, take the pet into the back.
 1. Make a cage card for the animal. Include name, date, and reason for the visit.
 2. Write the animal's name on one of our temporary collars.
 3. Put these in your pocket.
 4. Walk to the front and gently take the animal from the owner. Leave the dog's collar with the owner. CAUTION: Be gentle in dealing with an unknown animal.
 5. Take dogs to the kennel in the back. Take cats to the cat room. Take exotics to the exotics room.
 6. Put the temporary collar on the animal, and tape the cage card on the cage.
 7. Take the animal's folder, which the receptionist will have given you, and place it in the Drop Off box.
- When a pet is ready to go home, you will bring it up to its owner.
 1. Ask the receptionist which animal needs to go home.
 2. Ask the owner for leash and collar or carrier.

continued

3. Find the pet.
 4. Take it to its owner.
- When a client arrives for an appointment, the receptionist will prepare the file and hand it to you. Take it to the back and place it in the appropriate appointment slot. Tell the techs that Dr. [vet's name]'s appointment has arrived, or that a walk-in has arrived.
 - If a receptionist needs to leave the front for some reason, ask if you can help so that he/she doesn't have to leave. You can help when bathroom breaks are needed.

Helping the Technicians

If the phone room is quiet and the receptionists seem to have things under control, you can head to the treatment area. Here you will find the techs, who can almost always use a hand. How you can help:

1. Restraining an animal. Usually two people are needed to deal with an animal. If you see a tech trying to take an animal's temperature or trim nails with no help, offer to hold the animal. Special ways are needed to restrain the animal for a blood draw: the tech will be glad to show you.
2. Taking Temperatures. You can help hold the animal, particularly the head if the animal decides to bite.
3. Trimming Nails. If you do not know how to trim nails by looking for "the quick," ask a tech to teach you.
4. Weighing an animal.
5. Drawing Blood. If you do not know how and would like to learn, the techs will teach you. This process requires two people.
6. Fecal Tests. A tech will teach you how to attain a fecal sample and set up the fecal test.
7. Giving vaccines. Once you learn how to use needles, the techs and vets will let you draw and administer some vaccines, such as Bordetella and leptospirosis vaccines. You can also learn to give Adequan shots.
8. Pharmacy Work. Once you have worked at the clinic for several months, you will be allowed to fill prescriptions. The tech will print a label, which will tell you how many and what kinds of pills to place in the pill bottles. Apply the label to the bottle and initial it.
9. Anything else the tech asks you to do. NOTE: you will not be asked/allowed to perform any task for which you have not been trained. Take every opportunity to learn.

continued

End of the Day Duties

End of day clean-up duties depend on how busy the clinic has been that day. Whenever business begins to slow down toward closing time, you can begin working on the following tasks:

- **Take out the trash.** Try to get someone to help you carry the bag to the dumpster.
 1. Every trash can in the clinic must be emptied at the end of EVERY DAY.
 2. Retrieve one large black trash bag from under the sink in the cat room.
 3. Begin dumping the contents of every small trash can into the large bag. You do not need to change the trash bags in the smaller trash cans unless they are particularly dirty.
 4. Make sure you get every trash can—the ICU, employee lounge, and every treatment room. The cans in the cat room and the kennel will be cleaned by the kennel kids.
 5. Take the now full trash bag out to the dumpster.
 6. Replace any of the small bags that you had to throw away.
- **Vacuum**
 1. The vacuum is located in the freezer room, located off the exotics room.
 2. Insert one end of the vacuum into the various outlets in the way.
 3. Begin vacuuming the entire clinic (aside from the cat room and kennel).

Other Tasks to Complete When You Have Time

When you have time, such as a lull in activity or no appointments scheduled, other tasks must be completed.

1. **Filing.** The receptionists will show and help you with filing.
2. Restock the boxes of flea/tick/heartworm prevention on display in the reception area. (New boxes are stored in the stockroom. One of the vets must unlock that room for you.)
3. Restock the shelves of shampoos, ear cleaners, collars, ointments, etc. Most of these items are stored in the pharmacy area.
4. Clean the lobby. If at any point during the day the lobby looks dirty, sweep it. The broom is stored in the filing hall.

continued

5. Clean up any messes the techs have made in the back (blood, nail trimmings, animal hair, etc.) by spraying the treatment tables with Trifectant found in spray bottles.
6. Clean thermometers with alcohol swabs from the metal tins on the treatment tables.
7. Rinse the fecal loops and cups in the sink and place them in the Trifectant bath along with the urine collection trays.
8. Clean any dirty cages in ICU, isolation, or the cat room. For each cage,
 - Remove the mat from the cage and take it to the nearest bathtub.
 - Rinse off the mat and spray it with Trifectant. Leave it while you complete the next tasks.
 - Remove the newspaper from the cage and throw it away.
 - Spray the cage down with Trifectant.
 - Wipe the Trifectant with paper towels.
 - Line the cage with fresh newspaper found in every room of the clinic.
 - Go back to the mat – rinse it, dry it, and put it back in the cage on top of the newspaper.
9. Make sure all the animals have water, unless they will have surgery that day, and that all cats have litter boxes.
10. Check to see if the kennel kids need help cleaning cages, feeding, or walking dogs in the kennel.

Final Words—If you don't understand, always ask!

Case 10-3: Instructional Letter

Jonathan Varner, president of a professional organization, writes the incoming VP to explain how elections for new officers should be conducted.

The letter can be used as a reference by Dr. Dawson as she plans and executes the elections (see Case Document 10-3).

CASE DOCUMENT 10-3

May 12, 2009

Dr. Gabrielle Dawson
Department of Geography
San Diego State University
San Diego, CA

Dear Gabrielle,

As we discussed at AAGG in April, the VP of AAGG is responsible for conducting elections. From my experience in conducting the last election, I recommend that you begin this process immediately. The more persistent you are, the more efficient the process. Do as much as you can before faculty leave campus for the summer.

Time Table

In general, the election process begins during the late spring early summer. Ballots are developed and mailed by mid-September. Ballots should be returned and tabulated by mid-January and the results reported to the vice president. As vice president, you will inform me and then inform each person whose name appeared on the ballot about the results of the election.

Election Procedures

The following procedures should help you conduct the elections. Ultimately, when the AAGG procedures manual is complete, these will appear in the manual. Until that time, however, each president will be responsible for informing the vice-president of election procedures.

Materials Needed

- Election File—contains ballots of previous elections and names of nominating committees
- AAGG Directory—names, phone numbers, and email addresses of all members

continued

Gabrielle Dawson

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May 20, 2009

- Annual Meeting Agendas—protocols for announcing newly elected officers

Step 1: Creating a Nominating Committee

1. At the annual meeting in April, the president asks the general membership to consider individuals who should be asked to run for the office of Vice-President and Member-At-Large. Members are invited to send the names of individuals to the President.
2. The president also organizes a nominating committee. At AAGG, I asked three individuals—Steve Jones, Pam Souther, and Casey Morgan—to serve as the nominating committee. All agreed to serve. Casey Morgan agreed to chair the committee.

Note: Former officers of the organization are good choices for the nominating committee. They know what is involved in executing the duties of each office. I attempted to select a nominating committee of individuals from different regions in the US. With that point in mind, you could select four members of the committee, but more than four makes the committee unwieldy.

3. The nominating committee must recommend a minimum of six nominees for three member-at-large positions. Eight nominees will be fine, too. Three Vice-President nominees should be chosen. The chair of the nominating committee should ask each candidate for a one-paragraph (150-word) biographical profile.

Step 2: Selecting Nominees for Offices

1. In selecting candidates, you will want to consider several factors:
 - Interest in AAGG and its Activities. Look for people who have shown interest in the organization: attendance at regional and national meetings, people who engage in conversation on the listserv, people who make solid suggestions.
 - Interest in Geography and/or Geoscience. AAGG needs individuals who are effective spokespersons for both as fields of teaching and research: i.e., individuals who are effective and prolific researchers; people who are in charge of programs; people who are regular presenters at meetings.
 - Record of Dependability. VERY IMPORTANT! Try to determine how reliable an individual is. Stay in touch with the nominating committee.

continued

Gabrielle Dawson

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May 20, 2009

Once you get a list of individuals you are considering, please post the list on the Executive Committee listserv. If any of the potential nominees has a track record of non-performance, this is the time to determine that! Many people are "all talk," but slow on performance.

Note: Choose the VP very carefully. This is the person who will succeed you as president of AAGG. Because the president and vice-president have so much responsibility and because they will need to work as a team, be sure you choose someone with whom you can work and someone who will continue to strengthen the organization. AAGG has very strong individuals in its thirty-year history. Each group of officers must be committed to developing AAGG further.

Step 3: Developing the Ballot

1. Be sure to let Casey Morgan know when you want the final list of names. I would suggest that you ask for the list by the second week in September.
2. Contact each individual whose name was submitted by the nominating committee. Be sure that each person has agreed to be nominated and understands what is involved.
3. Develop the ballot and a letter that will be sent along with the ballot.
4. Send the ballot and the letter to Dan Jameson. He will make copies. Try to get this material sent to Dan no later than the third week in September.

Step 4: Monitoring the Election Process

1. Once he has the materials, Dan will duplicate and mail the ballots to the membership. He knows the procedure: each ballot has a self-addressed, stamped return envelope to ensure better response.
2. Dan will want all ballots returned by early January. He will count the ballots and report the results to you. As soon as you have the results, please call—rather than email—each candidate and report the results.

Step 5: Preparing for the Annual Meeting

1. Plan to introduce each of the officers at the meeting. After my farewell speech, I will hand the reins of the organization to you.
2. To help prepare for the meeting, discuss your agenda as president with the incoming VP. I would also suggest that you plan an informal gathering of all the new officers BEFORE the Executive Committee meeting. At the EC, as you are aware, we always have several hours of business to conduct. Meeting with the incoming officers will give you planning time with them.

continued

Gabrielle Dawson

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May 20, 2009

3. Be prepared to tell the general membership at the annual meeting your goals for the next two years. The newly-elected VP and members-at-large should be allotted time to express their concerns. Usually we allot fifteen minutes for this segment of the annual meeting.

Final Thoughts

The election process has been developed to attempt to involve a variety of individuals in the election process. The nominating committee should seek involvement of members in the organization who want to become more involved in AAGG. In no sense does the election process seek to exclude individuals other than those who are not interested in Geography and/or Geoscience and the development of AAGG as an organization.

As you work with the elections, keep notes on ways that the EC can improve the election process. Then add these to the agenda for the 2010 meeting.

As always, if you have any questions, please call me.

Sincerely,

Jonathan

ONLINE INSTRUCTIONS

Online instructions need to follow the same readability considerations as those used in letters, reports, and stand-alone instructions. Otherwise, the instructions will create confusion for many users.

Case 10-4

A university explained how to download class rosters from the faculty e-mail system and insert these into an Excel spreadsheet (see Case Document 10-4a). Note how the application of principles discussed in this chapter improves the instructions (see Case Document 10-4b). The revision supplanted the original, which diminished the number of calls to the computing help desk from faculty who were confused by the original instructions:

CASE DOCUMENT 10-4A

Original Online Instructions

How exactly do I get my roster from NEO, put it into an Excel spreadsheet and make a comma separated value (csv) file for uploading?

1. Log into your neo account, go to the Class Roster tool and go to the appropriate semester. Click on Download Class Roster and you'll see your class roster as a comma separated value (csv) file. Copy and paste this file into a blank excel spreadsheet and save. There's no way right now to actually download it.
2. To get rid of the quotes, go to Edit, then Replace. You want to find every " and replace it with a blank, so in the Find what box, type ", and put nothing into the Replace with box. Click on Replace All, and the quotes disappear.
3. Under File, select Save As option, and save the file as Formatted Text (space delimited)(*.prn). Choose OK and Yes to the questions that pop up. Close the file and answer no to the popup box. You don't want to save the changes.
4. Open the .prn file. The Text Import Wizard will pop up. Leave the file type as delimited and click next. Change the delimiter from tab to comma and click next. Holding the ctrl key down, click on the last four columns, and choose Do not import column (skip), then choose Finish.
5. Under File, select the Save As option. Change the file name to something that does not include the .prn, and save the file as CSV (Comma delimited) (.csv). Always answer yes to the question, "Do you want to keep the workbook in this format?" and when you close the file, answer no to "Do you want to save the changes?". Voila! This is the file the administrator needs.
6. To upload your students into your course, you only need the UIN numbers as a csv file. So, just delete the name columns and any rows above your data, and save. Always answer yes to the question, "Do you want to

keep the workbook in this format?" and when you close the file, answer no to "Do you want to save the changes?" Upload your file according to the directions in CPR. [\[top\]](#)

CASE DOCUMENT 10-4B

Revised Online Instructions

How to Download Your Roster

1. Click on download class roster. Note that your class roster now appears as a comma separated value (CSV) file.
2. Without closing the roster on Neo, create an Excel spreadsheet.
3. Go back to your roster. Copy the names.
4. Paste the roster into the Excel spreadsheet just as you copied it.

Get rid of the quotes ("").

1. Go to Edit on the toolbar, then to Replace.
You want to find every "" and replace it with a blank.
2. In the Find what box, type "", and put nothing into the Replace with box.
3. Click on Replace All, and the quotes disappear.

Prepare to Format the Information in the Excel Spreadsheet.

1. Under File, select Save As option, and save the file as Formatted Text (space delimited) (*.prn).
2. Choose OK and then Yes to the questions that pop up.
3. Close the file and answer no to the popup box.
4. Open the .prn file. The Text Import Wizard will pop up.

Select the Correct Boxes on the Wizard.

1. Leave the file type as delimited. Then click next.
2. Change the delimiter from tab to comma. Then click next. You will see the opening rows of your roster appear in neat columns.
3. Under File, select the Save As option.
4. Save the file as an Excel file. Be sure to save with a name descriptive of the contents.

With your file in an Excel spreadsheet, you can now create a grade or attendance sheet.

CHECKLIST FOR DEVELOPING INSTRUCTIONS/PROCEDURES

Because instructions require careful analysis of readers from many perspectives—the context in which the instructions will be read and used—following a checklist can be helpful in ensuring that you have considered critical issues needed for the instructions:

- ☐ Who are your readers? Describe them in terms of their knowledge of the subject: educational level, technical level, responsibilities in the organization.
- ☐ What do you want them to be able to do as a result of these instructions/procedures?
- ☐ What is the situation that has led to the need for these instructions/procedures to be written?
- ☐ How will these instructions/procedures be used? Will readers need to read all of them before they begin the task? In what context will readers be using these instructions?
- ☐ What problems could readers encounter in attempting to use these instructions/procedures?
- ☐ What types of problems in safety and/or quality control do you need to emphasize? What warnings or notes will you need to include?
- ☐ What topics do you want to be sure to include/exclude?
- ☐ What format will you use? Online, online to be printed, paper, manual, poster?
- ☐ Given the context in which the instructions/procedures will be read, what formatting strategies do you need to use to enhance accessibility?
- ☐ What types of visuals will you need to include?
- ☐ What is the basic outline of your instructions? Does this outline meet the needs of your readers? Will it achieve your purpose?