THE MANUAL: OFFICE PROCEDURES

Now that the terms of employment have been fully addressed, the procedures for working in your office should be outlined. This portion of the manual should provide the employee with detailed instruction of how to perform their duties as well as instruction in performing the duties of someone else if needed.

SECURITY

Because a law firm handles confidential information, maintaining security is imperative. Of biggest concern today is electronic security for computer systems and files. (Please see our handout on "Email, Internet and Wireless" in the Risk Management Resources section of our website for more information on developing policies regarding electronic file policies.)

Another aspect of security is the proper disposal of confidential information. Shredding policies for documents should be addressed. If your firm employs a disposal company to shred documents for you, placing confidential documents in secure containers until it is picked up to be shredded should be stressed. Leaving confidential information in a recycle box to be emptied later could be a liability should someone gain access to your office.

To prevent unauthorized access to your office, outline opening and closing procedures that provide security for your staff and your confidential information. Physical access to the office was described in the office structure section, but reiterate security procedures as part of the maintaining confidentiality process.

EMERGENCY OR DISASTER

Hopefully never to be needed, every office needs an emergency and/or disaster plan. Natural disasters such as hurricanes or flooding should be addressed, but modern disasters such as server crashes must be Another portion of emergency planning is the procedure for an on the job emergency. Describe the procedure for reporting injuries. If the incident is a worker's compensation claim, include information regarding proper procedures for notifying management.

REPRESENTING FIRM

This section furthers the basic code of conduct outlined in the personnel policies. Provide instruction regarding the proper way to greet clients and answer the telephone. While these simple gestures may be second nature to some, having guidelines will present a uniform image of the office.

Maintaining confidentiality is another portion of representing firm. This requires no watercooler gossip within earshot of clients who are visiting the office. Remind employees that they are not allowed to discuss cases in front of clients.

REPRESENTING CLIENTS

Of course the most important function of a law firm is the representation of clients. This section describes the proper office procedures for engaging and declining representation. Referring cases to third party lawyers should be delicately handled, for example, when your firm cannot accept a case.

The proper use of engagement letters is crucial for establishing client relationships. Be sure staff know the procedures for using engagement, non-engagement and dis-engagement letters so that representations are clearly established from start to finish. These letters can greatly reduce the headaches caused by misunderstandings between clients and attorneys. (For more information, including sample letters, please see our "Attorney-Client Relationships" handout in the Risk Management Resources section of our website.)

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Cheryl Price

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Dental Office Administration Geraldine S Irlbacher, Guy S. Girtel, 2020-03-18 Dental Office Administration is a comprehensive resource that details the responsibilities of the dental office professional providing practical communication techniques and tips for problem solving It also provides the necessary clinical background information every dental office professional needs for a successful practice Hands on activities within the text require students to practice common tasks such as dental charting writing a memo or conducting a mock telephone call with another student A free bonus DVD ROM for Windows includes practice management software called DENTRIXG4 practice management to give students real world experience managing patient data and filing electronic claims A companion Website includes the full text and a quiz bank

The Complete Guide to Designing Your Law Office Suzette S. Schultz, Jon S. Schultz, 2005 This comprehensive new resource provides all the information needed to plan or remodel a law firm s office space Helpful checklists schedules forms and letters are included on the accompanying CD ROM Office-Based Procedures, An issue of Urologic Clinics J. Stephen Jones, 2013-11-28 This issue of the Urologic Clinics covers office based procedures in urology There are a wealth of urologic procedures that can be done in the office setting offering reduced risks to the patient less stress and better recovery time as well as a more favourable reimbursement for the physician Articles include more common issues such as stone management ultrasound prostate biopsy and vasectomy as well as infusion therapy biofeedback and office anesthesia Procedures for the Medical Administrative Assistant Heather D Ramsay, Marie Rutherford, 2019-12-11 NEW Four Colour design with new art programme better illustrates current concepts and improves readability and visual appeal UPDATED Expanded coverage of healthcare plans across Canada NEW Coverage of Electronic Medical Records EMR NEW Evolve site including chapter review questions review questions videos forms and templates audio glossary and more UPDATED Reflects contemporary standards technological tools and terminology used in day to day modern health care practice NEW New and revised learning tools including learning objectives key terms assignment boxes tips critical thinking boxes and Did You Know boxes UPDATED Reflects current privacy legislation PIPEDA and changes to provincial and territorial Freedom of Information acts NEW Chapter order and comprehensive Table of Contents **Real Estate Office Management** Real Estate Brokerage Managers Council (Chicago, Ill.), Dearborn Real Estate Education, 2003-11-03 Intense competition makes intelligent state of the art real estate office management the key not only to success but to survival The Real Estate Brokerage Council produced the first edition of Real Estate Office Management for brokers classes taught by the Realtor's National Marketing Institute where it is still required reading Highlights of this book include Leadership planning organizing and communicating Recruiting agency types and training Retaining motivating and terminating employees Record keeping and financial systems Marketing and utilizing statistical records Analyzing Real Estate growth patterns Mergers and acquisitions Procedures for the Office Professional Patsy J. Fulton, Joanna D. Hanks, Reynolds, 1995 **Law Office**

Procedures Manual for Solos and Small Firms Demetrios Dimitriou,2000 A guide to setting policies and establishing procedures that should keep a law office operating efficiently This second edition features new chapters on topics such as the family and medical leave act Internet use and more The diskette contains the text in WordPerfect 6 x and ASCII formats

Create and Use Simple Spreadsheets (Excel 2003). Cheryl Price, Julia Wix, 2004 The purpose of this Study Guide is to provide information for the tutor and student in relation to the Elements of Competency in BSBCMN214A Create and Use Simple Spreadsheets page i Kinn's The Administrative Medical Assistant - E-Book Alexandra Patricia Adams, 2013-10-21 The most comprehensive front office medical assisting resource available Kinn's The Administrative Medical Assistant 7th Edition provides unparalleled coverage of the practical real world administrative skills essential to your success in the health care office This thoroughly updated fully modernized edition combines current reliable content with innovative support tools to deliver an engaging learning experience and help you confidently prepare for today s competitive job market Apply what you learn to realistic administrative situations through an Applied Learning Approach that integrates case studies at the beginning and end of each chapter Study more effectively with detailed Learning Objectives Vocabulary terms and definitions and Connections icons that link important concepts in the text to corresponding exercises and activities throughout the companion Evolve Resources website and Study Guide Procedure Checklist Manual Confidently meet national medical assisting standards with clearly identified objectives and competencies incorporated throughout the text Master key skills through step by step instructions and full color illustrations that clarify procedures Sharpen your analytical skills and test your understanding of important concepts with critical thinking exercises Understand the importance of patient privacy with the information highlighted in helpful HIPAA boxes Demonstrate your proficiency to potential employers with an interactive portfolio builder on the companion Evolve Resources website Familiarize yourself with the latest administrative office trends and issues including the Electronic Health Record Confidently prepare for the CMA and RMA certification exams with a new online appendix that mirrors the exam outlines and provides fast efficient access to related content Find information quickly and easily with newly reorganized chapter content and charting examples Reinforce your understanding through medical terminology audio pronunciations Medisoft practice management software exercises chapter guizzes review activities and more on the completely revised companion Evolve Resources website Kinn's The Medical Assistant - E-Book Deborah B. Proctor, Alexandra Patricia Adams, 2014-03-27 The most comprehensive medical assisting resource available Kinn's The Medical Assistant 11th Edition provides unparalleled coverage of the practical real world administrative and clinical skills essential to your success in health care Kinn s 11th Edition combines current reliable content with innovative support tools to deliver an engaging learning experience and help you confidently prepare for today s competitive job market Study more effectively with detailed Learning Objectives Vocabulary terms and definitions and Connections icons that link important concepts in the text to corresponding exercises and activities throughout the companion Evolve Resources website and Study

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Operate computing package Access 2002, **Emergency Department Leadership and Management Stephanie** Kayden, Philip D. Anderson, Robert Freitas, Elke Platz, 2015 Written for a global audience by an international team the book provides practical case based emergency department leadership skills Create and Use Databases (Access 2003) Cheryl Price, Julia Wix, 2004 This workbook guides the user through the many aspects of Microsoft Access Produce Simple Word Processed Documents (Word 2003) Cheryl Price, 2004 Design and Develop Text Documents (Publisher 2002) Cheryl Price, Julia Wix, 2002 Virtual Gal Friday's Virtual Assistant Start Up Guide , Create Electronic Presentations (PowerPoint 2003) BSBADM306A Cheryl Price, Julia Wix, 2004 **Produce Business Documents 2003** Cheryl Price, Julia Wix,2003-03 Design and Develop Text Documents (Word 2003) Cheryl Price, Julia Wix, 2004 **Design and Develop Text Documents (Word 2002)** Cheryl Price, Julia Wix, 2003

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