

# OFFICE PROCEDURES MANUAL



LAWYERS  
MUTUAL

LIABILITY INSURANCE  
COMPANY OF  
NORTH CAROLINA

## RISK MANAGEMENT PRACTICE GUIDE OF LAWYERS MUTUAL

AN OFFICE POLICIES AND PROCEDURES MANUAL IS COMPOSED OF TWO DISTINCT SECTIONS.

- 1** The **OFFICE POLICIES SECTION** refers to rules and regulations, like employment, behavior, and inclement weather procedures.

- 2** The **OFFICE PROCEDURES SECTION** documents administrative functions like file management, conflicts of interest checking, managing the trust account, calendaring, and routine activities like opening mail and answering the phone.

### THE MANUAL

#### WRITING THE MANUAL

1. Use simple language. Sentences 20 words or less.
2. Have a detailed structure — outline format.
3. Use a positive tone.
4. Compile information before you begin to write the manual.
5. Avoid specific actions and instead focus on standard document preparation.
6. Organize information into categories to give the manual structure.
7. Create a production schedule.
8. Edit for consistency.
9. Establish a review.

#### STANDARD FORMATS

Policies and standards on the following:

- **Typography.**
- **Letters and Memos.** Including fax cover sheets.
- **Pleadings.** Include format rules dictated by the courts.
- **Other Documents.** This might include email formatting, forms, office signatures.

#### OFFICE STRUCTURE

- **Introduction.** Include firm's mission.
- **Building Layout and Access.** Maps of the building and office layout access to the office outside of business hours.
- **Job Descriptions.** Identify responsibility for jobs and tasks.
- **Supplies and equipment.** Location of supplies and equipment, and maintenance procedures.

#### OFFICE PROCEDURES

Detailed instructions on:

- Security
- Emergency or Disaster
- Representing Firm
- Representing Clients
- Communications
- Filing System
- Docket Control System
- Finances

#### PERSONNEL POLICIES

- **General Policies.** Include federal and state regulations.
- **Employment.** Classification, personnel files, disciplinary/termination terms.
- **Conduct.** Include online behavior and use of office equipment and supplies.
- **Hours of Work.** Describe any telecommuting or alternate schedules.
- **Benefits.**
- **Holidays and Paid Leave.**

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# Office Procedures Manual Sample

**SB Merriam**



## Office Procedures Manual Sample:

Law Office Policy & Procedures Manual Howard I. Hatoff, Robert C. Wert, 2006 This manual helps medium and large law firms increase productivity by providing a model manual for law office policies and procedures The book an updated and expanded version of the previous fourth edition is divided into seventeen sections covering such topics as law office organization management and administration support personnel office policies personnel policies and benefits office security and emergency procedures financial management file systems technology and communications systems The book contains numerous sample forms and documents as well as extensive bibliographies A CD containing the entire text of the manual is included allowing customization of the manual for particular user needs Simple Maintenance Office Procedures Manual Susan Welt, 1981 **Modern typewriting and manual of office procedure. [With] Teacher's handbook and key** Arthur E. Morton, 1903 *The Legal Career Guide* Gary A. Munneke, 2002 Introducing the latest edition of this step by step guide for planning and executing a job search This book is filled with practical advice that will help anyone find their personal niche in the legal profession *Home Interview Survey District Office Procedures Manual* Chicago Area Transportation Study, 1957 Modern Typewriting and Manual of Office Procedure Arthur E. Morton, 1919 Navy Management Review United States. Navy Department, 1958 *Athletic Director's Desk Reference* Donna A. Lopiano, Connee Zotos, 2022-02-15 This applied reference includes management tips planning tools and policies for athletic administrators Designed primarily as a reference for intercollegiate athletic program administrators high school athletic administrators courses in athletic administrations and libraries *Athletic Director's Desk Reference* Lopiano, Donna, Zotos, Connee, 2013-11-07 Athletic Director's Desk Reference is the most authoritative and comprehensive resource available for collegiate athletic administrators This book and web resource guide program administrators in navigating their increasingly complex roles in athletic programs of any size *Professional Practice for Landscape Architects* Rachel Tennant, Nicola Garmory, Clare Winsch, 2015-09-16 Professional Practice for Landscape Architects third edition deals with the practical issues of being a successful landscape architect professional Endorsed by the Landscape Institute this book is an indispensable guide for licentiate members of the Institute on their Pathway to Chartership It follows the revised 2013 syllabus covering all aspects of professional judgement ethics and values the legal system organisation and management legislation and the planning system environmental policy and control procurement and implementation It also serves as a reminder and reference for fully qualified professionals in their everyday practice and for landscape students Valuable information is presented in an easy to follow manner with diagrams and schedules key acts professional documents and contracts clearly explained and made easy to understand A handy list of questions are included to aid with P2C revision answers of which are found within the text Plunkett's 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 *Jones & Bartlett Learning's Administrative Medical Assisting* Julie Ledbetter, 2020-04-23 Designed to ensure that every medical assisting graduate can quickly trade a cap and gown for a set of scrubs Jones Bartlett Learning s Administrative Medical Assisting Fourth Edition is more than just a textbook it s an engaging dynamic suite of learning resources designed to train medical assisting students in the administrative skills they ll need in today s rapidly changing health care environment

The Credentialing Handbook Sheryl Deutsch, Sheryl K. Deutsch, Christine S. Mobley, 1999 The Credentialing Handbook provides comprehensive plain English guidance to understand and master the provider credentialing process in any health care setting With sample forms checklists flowcharts and correspondence this practical guide walks you through every aspect of effective credentialing appointment and recredentialing You ll learn key steps in the credentialing process about express credentialing models how to credential allied health practitioners typical time frames and tracking systems pros and cons of delegating credentialing plus more *Produce Simple Word Processed Documents (Word 2003)* Cheryl Price, 2004

**Business and Legal Essentials for Nurse Practitioners** Sally J. Reel, Ivo Luc Abraham, 2007-01-01 Business and Legal Essentials for Nurse Practitioners fosters a relationship between health business and law The book addresses issues from negotiating an employment contract to establishing an independently owned nurse practitioner practice Each section in increments provides greater detail from a legal standpoint and describes what resources and options are available to the nurse practitioner upon graduation and beyond Written for the student graduate and practicing nurse practitioner Business and Legal Essentials outlines the necessary steps to eventual practice ownership KEY FEATURES Provides an overview of advanced practice including the scope of NP practice and prescriptive authority Covers details involved in owning a practice including advantages and disadvantages identifying various practice needs and the legal issues of reimbursement and credentialing Explains business plans in detail including important information regarding insurance administration support physical space and technology needs Provides a range of information on alternate types of nurse practitioner businesses Describes HIPPA and its effect on the nurse practitioner practice Includes effective marketing strategies needed to promote a new or existing practice dadirect.com *Procedural Report on the 1960 Censuses of Population and Housing* United States. Bureau of the Census, 1963 **Design and Develop Text Documents (Word 2002)** Cheryl Price, Julia Wix, 2003

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