

# 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 Template 2015

**Ruth Bryant, Denise Nix**



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## **Table of Contents Office Procedures Manual Template 2015**

1. Understanding the eBook Office Procedures Manual Template 2015
  - The Rise of Digital Reading Office Procedures Manual Template 2015
  - Advantages of eBooks Over Traditional Books
2. Identifying Office Procedures Manual Template 2015
  - Exploring Different Genres
  - Considering Fiction vs. Non-Fiction
  - Determining Your Reading Goals
3. Choosing the Right eBook Platform
  - Popular eBook Platforms
  - Features to Look for in an Office Procedures Manual Template 2015
  - User-Friendly Interface
4. Exploring eBook Recommendations from Office Procedures Manual Template 2015
  - Personalized Recommendations
  - Office Procedures Manual Template 2015 User Reviews and Ratings
  - Office Procedures Manual Template 2015 and Bestseller Lists

5. Accessing Office Procedures Manual Template 2015 Free and Paid eBooks
  - Office Procedures Manual Template 2015 Public Domain eBooks
  - Office Procedures Manual Template 2015 eBook Subscription Services
  - Office Procedures Manual Template 2015 Budget-Friendly Options
6. Navigating Office Procedures Manual Template 2015 eBook Formats
  - ePub, PDF, MOBI, and More
  - Office Procedures Manual Template 2015 Compatibility with Devices
  - Office Procedures Manual Template 2015 Enhanced eBook Features
7. Enhancing Your Reading Experience
  - Adjustable Fonts and Text Sizes of Office Procedures Manual Template 2015
  - Highlighting and Note-Taking Office Procedures Manual Template 2015
  - Interactive Elements Office Procedures Manual Template 2015
8. Staying Engaged with Office Procedures Manual Template 2015
  - Joining Online Reading Communities
  - Participating in Virtual Book Clubs
  - Following Authors and Publishers Office Procedures Manual Template 2015
9. Balancing eBooks and Physical Books Office Procedures Manual Template 2015
  - Benefits of a Digital Library
  - Creating a Diverse Reading Collection Office Procedures Manual Template 2015
10. Overcoming Reading Challenges
  - Dealing with Digital Eye Strain
  - Minimizing Distractions
  - Managing Screen Time
11. Cultivating a Reading Routine Office Procedures Manual Template 2015
  - Setting Reading Goals Office Procedures Manual Template 2015
  - Carving Out Dedicated Reading Time
12. Sourcing Reliable Information of Office Procedures Manual Template 2015
  - Fact-Checking eBook Content of Office Procedures Manual Template 2015
  - Distinguishing Credible Sources
13. Promoting Lifelong Learning

- Utilizing eBooks for Skill Development
- Exploring Educational eBooks
- 14. Embracing eBook Trends
  - Integration of Multimedia Elements
  - Interactive and Gamified eBooks

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