

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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find detailed guidance on technical skills like management of appointments and schedules health insurance billing and use of office automation systems as well as advice on personnel management effective communication ethical and legal issues patient confidentiality and many other issues that are essential to your success And you will like how easy this Manual is to use Samples of consent forms letters and procedural policies offer concrete examples for you to follow Manager Alerts point out potential pitfalls and tell you how to avoid them Helpful From the Author s Notebook tips describe the best ways to handle a variety of office problems

Local Government Purchasing Guide for Commonly Used Maintenance Supplies Illinois. Department of Local Government Affairs,1974 Local Government Purchasing Guide for Commonly Used Chemicals ,1973 **State and Local Government Purchasing** National Association of State Purchasing Officials (U.S.),Council of State Governments,1975 Administration & Management ,1980 **NOMA Bibliography for Office Management** National Office Management Association,1959 **Project Director's Manual** University of Michigan. Office of Research Administration,1968 **Purchasing, a Guide Book for Local Governments** Illinois. Department of Commerce and Community Affairs. Office of Local Management Services,1980 NOMA Bibliography for Office Managers Administrative Management Society,1961 *Kansas Register* ,2000 A Guide to Business Principles and Practices for Interior Designers Harry Siegel,Alan M. Siegel,1982 A guide to The importance of sound business practice in the interior design office How to establish an interior design practice Carrying a job through and charging for it The special requirements of nonresidential work Forms relations with trade sources and other special factors

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