

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 Guide Sample

Arthur E. Morton

Office Procedures Guide Sample:

Compendium of Research Reports ,1980 *Instructor's Manual and Key for Medical Office Procedures* Karonne J. Becklin,1999 **Community Revitalization Bibliography** ,1980 *Modern typewriting and manual of office procedure.* [With] *Teacher's handbook and key* Arthur E. Morton,1903

Law Office Procedures Manual for Solos and Small Firms

Demetrios Dimitriou,2005 This step by step guide is the key to developing a tailor made office procedures manual containing everything from client data sheets and docket control systems to employee benefits and file management policies In addition the entire text is included on CD ROM fr easy customization *Law Office Procedures* Judy A. Long,1997 A practical comprehensive text that prepares the legal assistant and legal secretarial student for the law office Includes a general overview of various areas of substantive law focusing on documents and forms that students will commonly prepare Explanations are appropriate for students of all levels Numerous sample documents and forms are provided along with practical exercises Projects at the end of each chapter give students practical experience with tasks they will perform on the job such as proofreading document and form preparation and advanced drafting and research assignments Documents for selected Projects are provided on disk in WordPerfect for easy access and editing Students can also build a Notebook portfolio of documents they ve prepared to use in job interviews and as an on the job reference A simulated law office is presented in the introduction in which the student will be employed throughout the text ALSO AVAILABLE INSTRUCTOR SUPPLEMENTS CALL CUSTOMER SUPPORT TO ORDER Data Disk ISBN 0 314 21867 X Instructors Manual w Test Bank Transparency ISBN 0 314 20680 9

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the most important content writing interview questions How to get content writing jobs online This is just a glimpse for an exhaustive list check the content table inside **Legal Information Buyer's Guide and Reference Manual 2006** Kendall F. Svengalis,2006 *The Essential Formbook* Gary A. Munneke,Anthony E. Davis,2000 This volume aims to help you to establish profitable affirmative client relationships so you can avoid unnecessary risks associated with malpractice and disciplinary complaints It provides information about law firm management structure models use of ethics and general counsel Included is the Model Partnership Agreement Form and coverage of liability insurance no goodwill severance and vacations as well as potential problems including withdrawal disability death and payment obligations Section Two Client Intake and Fee Agreements walks you through the intake process including how to effectively gather information on new clients manage the client selection process make judgments and use engagement and nonengagement letters

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Urban & Regional Technology & Development ,1980 *Official Export Guide* North American Publishing Company,1993 **Assessment Practices Survey and Assessor's Response, Sierra County** California. State Board of Equalization,1996 **Internal Survey Manual, 1959** Pittsburgh Area Transportation Study,1959 **Resources in Education** ,1992 *Law Notes for the General Practitioner* ,1975 *The Guide to the Professional Conduct of Solicitors* Law Society (Great Britain),1990 **Local Government Purchasing Guide for Commonly Used Chemicals** ,1973

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