

# 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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# Business Office Procedures Manual Template

**Lehman, Forde**



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how to increase the efficiency productivity and profitability of the firm recognizing the interrelationships with one another Reveals how to increase the capacity and value of the practice Given an aging population of financial advisors and increased focus on succession planning increasing the value of a financial practice is a key deliverable of efficiency and this book showcases the best ways to do so      **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      **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 BSBCM214A Create and Use Simple Spreadsheets page i

**Procedures for the Office Professional** Fulton,Joanna D. Hanks,1995 This text is designed to help prepare students for a successful office career Realistic office Case Studies challenge the student to apply concepts and recommend strategies for solving problems Emphasizes critical thinking and communication as well as the importance of human resources It has a permanent value as a handbook for office professionals      *Virtual Gal Friday's Virtual Assistant Start Up Guide* ,

**Produce Simple Word Processed Documents (Word 2003)** Cheryl Price,2004      *Design and Develop Text Documents (Word 2002)* Cheryl Price,Julia Wix,2003      Create Electronic Presentations (PowerPoint 2003) BSBADM306A Cheryl Price,Julia Wix,2004      *Office Management Handbook* Harry Lester Wylie,1958      **Word Processing** Lehman,Forde,1993-03      **Legal Information Buyer's Guide and Reference Manual** Kendall F. Svengalis,Rhode Island LawPress,2008      *Marshall, Barrett and Co.* Mark W. Lehman,Connie Forde,Carol M. Lehman,1989-08      **Southwestern College Keyboarding for Windows Document Processing with Microsoft Word 6.0 and WordPerfect 6.0** Charles H. Duncan,Susie H. VanHuss,S. Elvon Warner,Connie Forde,Donna L. Woo,1995 College Keyboarding Document Production Course consists of Lessons 121 180 divided into two levels The Training Manual located at the end of the textbook is a handy reference for reviewing as well as learning new functions All of the functions learned in the Windows Introductory course and Formatting course are applied and new functions are introduced Keyboarding word processing advanced course in both quarter and semester programs found in business and information systems departments at both two and four year schools

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Lewis Keeling,1999-10 This text provides students with the most up to date information reflecting contemporary  
management thinking issues and trends that every employee needs to know      **The Insurance Press** ,1909      **Desktop**  
**Publishing Using PageMaker on the IBM PC** Don Busché,1989      The Software Encyclopedia 2001 ,2001

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