

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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General Office Manual

Robert R. Redfield



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Table of Contents General Office Manual

1. Understanding the eBook General Office Manual
 - The Rise of Digital Reading General Office Manual
 - Advantages of eBooks Over Traditional Books
2. Identifying General Office Manual
 - 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 General Office Manual
 - User-Friendly Interface
4. Exploring eBook Recommendations from General Office Manual
 - Personalized Recommendations

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

- 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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