

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

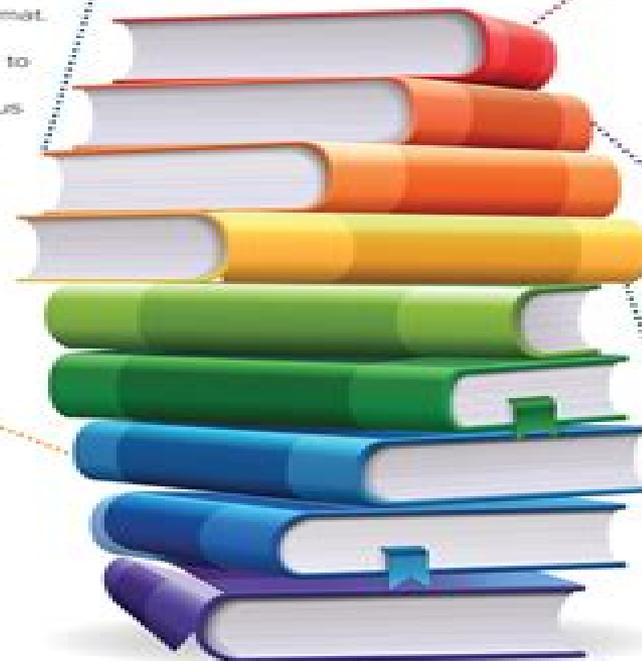
WRITING THE MANUAL

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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Law Office Procedure Manual Examples

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Law Office Procedure Manual Examples:

Law Office Policy & Procedures Manual Howard I. Hatoff, Robert C. Wert, 2006 This manual helps medium and large law firms increase productivity by providing a model manual for law office policies and procedures The book an updated and expanded version of the previous fourth edition is divided into seventeen sections covering such topics as law office organization management and administration support personnel office polices personnel policies and benefits office security and emergency procedures financial management file systems technology and communications systems The book contains numerous sample forms and documents as well as extensive bibliographies A CD containing the entire text of the manual is included allowing customization of the manual for particular user needs *The Complete Guide to Designing Your Law Office* Suzette S. Schultz, Jon S. Schultz, 2005 This comprehensive new resource provides all the information needed to plan or remodel a law firm s office space Helpful checklists schedules forms and letters are included on the accompanying CD ROM **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 **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 A Practical Guide to Preventing Legal Malpractice Duke Nordlinger Stern, 1983 **Modern typewriting and manual of office procedure. [With] Teacher's handbook and key** Arthur E. Morton, 1903 The Lawyer's Guide to Effective Yellow Pages Advertising Kerry Randall, Andru J. Johnson, 2005 Although Yellow Pages advertising should be a major profit building business marketing strategy for many law firms the harsh reality is that 99% of ads simply don t work This book will provide you with the information you need to create effective powerful Yellow Pages ads and drive your client development programs forward You ll find information on identifying and focusing on your target market as well as how to plan and design the perfect ad that not only reaches potential clients but motivates them to call Book jacket **The Alabama Lawyer** ,1982 Law Firm Liability Insurance Crisis ,1986 *Law Notes for the General Practitioner* American Bar Association. Section of General Practice, 1982 Avoiding Legal Malpractice Claims Duke Nordlinger Stern, 1987 *The Lawyer's Guide to Fact Finding on the Internet* Carole A. Levitt, Mark E. Rosch, 2004 This updated and expanded second edition is your complete hands on guide that shares the secrets shortcuts and realities of conducting fact finding on the Internet **California Criminal Law Procedure and Practice** ,2009 The Florida Bar Journal ,1982 Proceedings of the 21st 43d annual convention of the Florida State Bar Association included in v 2 24 1st annual convention of the Florida Bar in v 24 The Business Law Journal ,1927 **The Wisconsin Bar Bulletin** ,1963

Michigan State Bar Journal ,1928 **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

Easy Self-audits for the Busy Law Office Nancy Byerly Jones,1999 This easy to use tool will assist the attorney in conducting their own self audits Whether they want to streamline procedures foster teamwork or build client relations this book dwill identify the practice s problem areas as well as offer ideas to improve them *The Practical Lawyer* ,1984

Whispering the Strategies of Language: An Psychological Journey through **Law Office Procedure Manual Examples**

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