

THE MANUAL: OFFICE PROCEDURES

Now that the terms of employment have been fully addressed, the procedures for working in your office should be outlined. This portion of the manual should provide the employee with detailed instruction of how to perform their duties as well as instruction in performing the duties of someone else if needed.

SECURITY

Because a law firm handles confidential information, maintaining security is imperative. Of biggest concern today is electronic security for computer systems and files. (Please see our handout on "Email, Internet and Wireless" in the Risk Management Resources section of our website for more information on developing policies regarding electronic file policies.)

Another aspect of security is the proper disposal of confidential information. Shredding policies for documents should be addressed. If your firm employs a disposal company to shred documents for you, placing confidential documents in secure containers until it is picked up to be shredded should be stressed. Leaving confidential information in a recycle box to be emptied later could be a liability should someone gain access to your office.

To prevent unauthorized access to your office, outline opening and closing procedures that provide security for your staff and your confidential information. Physical access to the office was described in the office structure section, but reiterate security procedures as part of the maintaining confidentiality process.

EMERGENCY OR DISASTER

Hopefully never to be needed, every office needs an emergency and/or disaster plan. Natural disasters such as hurricanes or flooding should be addressed, but modern disasters such as server crashes must be

Another portion of emergency planning is the procedure for an on the job emergency. Describe the procedure for reporting injuries. If the incident is a worker's compensation claim, include information regarding proper procedures for notifying management.

REPRESENTING FIRM

This section furthers the basic code of conduct outlined in the personnel policies. Provide instruction regarding the proper way to greet clients and answer the telephone. While these simple gestures may be second nature to some, having guidelines will present a uniform image of the office.

Maintaining confidentiality is another portion of representing firm. This requires no watercooler gossip within earshot of clients who are visiting the office. Remind employees that they are not allowed to discuss cases in front of clients.

REPRESENTING CLIENTS

Of course the most important function of a law firm is the representation of clients. This section describes the proper office procedures for engaging and declining representation. Referring cases to third party lawyers should be delicately handled, for example, when your firm cannot accept a case.

The proper use of engagement letters is crucial for establishing client relationships. Be sure staff know the procedures for using engagement, non-engagement and dis-engagement letters so that representations are clearly established from start to finish. These letters can greatly reduce the headaches caused by misunderstandings between clients and attorneys. (For more information, including sample letters, please see our "Attorney-Client Relationships" handout in the Risk Management Resources section of our website.)

Office Manager Procedures Manual

Liying Dong



Office Manager Procedures Manual:

The book delves into Office Manager Procedures Manual. Office Manager Procedures Manual is a vital topic that must be grasped by everyone, from students and scholars to the general public. This book will furnish comprehensive and in-depth insights into Office Manager Procedures Manual, encompassing both the fundamentals and more intricate discussions.

1. This book is structured into several chapters, namely:
 - Chapter 1: Introduction to Office Manager Procedures Manual
 - Chapter 2: Essential Elements of Office Manager Procedures Manual
 - Chapter 3: Office Manager Procedures Manual in Everyday Life
 - Chapter 4: Office Manager Procedures Manual in Specific Contexts
 - Chapter 5: Conclusion
 2. In chapter 1, the author will provide an overview of Office Manager Procedures Manual. The first chapter will explore what Office Manager Procedures Manual is, why Office Manager Procedures Manual is vital, and how to effectively learn about Office Manager Procedures Manual.
 3. In chapter 2, the author will delve into the foundational concepts of Office Manager Procedures Manual. The second chapter will elucidate the essential principles that must be understood to grasp Office Manager Procedures Manual in its entirety.
 4. In chapter 3, the author will examine the practical applications of Office Manager Procedures Manual in daily life. The third chapter will showcase real-world examples of how Office Manager Procedures Manual can be effectively utilized in everyday scenarios.
 5. In chapter 4, the author will scrutinize the relevance of Office Manager Procedures Manual in specific contexts. The fourth chapter will explore how Office Manager Procedures Manual is applied in specialized fields, such as education, business, and technology.
 6. In chapter 5, this book will draw a conclusion about Office Manager Procedures Manual. This chapter will summarize the key points that have been discussed throughout the book.
- The book is crafted in an easy-to-understand language and is complemented by engaging illustrations. It is highly recommended for anyone seeking to gain a comprehensive understanding of Office Manager Procedures Manual.

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