

Let's Write That Office Policy Manual!

If your office policy manual is non-existent, read on! I mentioned in a previous article that having a manual could be very important to you. This overview of the manual is a more detailed list of what items you should include, and why you should include them. The manual should have two sections: "Employee Rules and Regulations" and "Employee Benefits." What follows is simply a sample of an employee manual, in glossary form.

Section I - Employee Rules and Regulations

Welcome Letter

Mission Statement - the purpose of your office.

Patient Perceptions - This is the opportunity for you to communicate to your new employees what chiropractic means to you; why good attitudes are important; what contact with the public means; how important it is to you that contact be handled appropriately; and the importance of each new patient to the practice.

Absences - Define what an excused absence is (and is not); how your office coordinates these absences so that they are not unduly affected; under what circumstances employees will be paid when they are absent; and the maximum amount of time allowed for a leave of absence.

Breaks - Keep the law in mind about 15 minute breaks every four hours. It is possible that you need to "help" employees who want or need these breaks to take them. You won't find them making personal phone calls on company time if they know they have time allotted for this purpose.

Decorum - Courtesy issues (your policy on gum-chewing, eating at the front desk, etc.) should be written down so employees know what they can and can't do.

Employee Evaluations - Define the purpose of employee evaluations - to go over achievements, goals, objectives, strengths and weaknesses. This gives you a proper venue for documenting problems in employee files so when termination is necessary, documentation has already been done.

Employee Status - The employee is required to inform your office if any of the following occurs: a change of address or marital status (for payroll purposes), a telephone number change, a change in the number of dependents, etc.

Grievances - policy on how grievances between employees should be handled.

Illness - who to call if the employee is ill, and when (and if) time off for illness is paid or not.

Interoffice Communications - when it is important to document items in writing versus verbal communications.

Lunch - Detail how and when employees should schedule lunch, and how to coordinate the answering systems, who has responsibility for answering phones during lunch, etc.

Office Cleaning - You need to list what is expected and how often, if you expect staff to clean the office. It becomes office policy when written down, and more likely to be done.

Patient Education - This section should advise employees on answering patient questions about chiropractic, giving out literature, referring questions to the doctor or office manager, etc. It should also describe tools available in the office (for example, a list of brochures available or videos patients can check out).

Patient Relations - This should cover things such as: not telling patients about the doctor's personal business, or any staff member's personal business or problems. It should tell about the patient and his/her health. Stress the staff not to "over-promise healing." Advise no dating other employees or patients, that patient records are confidential, and that the staff is never to discuss any information about any patient outside the office.

Personal Appearance - Your requirement for dress or "dress code" should be noted here.

Probation Period - This should be set up so that the beginning of employment is a "trial" period for both employee and doctor to see if they are a good match. Whether your trial period is six weeks or six months, have it in writing.

Salary - Give instructions not to discuss salary or hourly wages with other employees, and explain time card usage or other requirements for documenting time spent at the office on company business. Discuss the signature on the W-4 form (for deductions) and I-9 form (federal requirement to make sure you are not hiring an alien).

Staff Meetings - when they are, and why employees are expected to attend.

Staff Relations - what to do if staff receives conflicting instructions from the office manager and the doctor; why it is inappropriate to use office postage for personal mail; career opportunities in the office; why moonlighting might not work if it conflicts with an employee's interest or loyalties; and when and when not to give out patient information requested over the phone by insurance companies.

Tardiness - how it affects the office.

Termination - Define grounds for immediate termination. This could include:

- abusive language to a patient, the doctor or an other staff member;
- alteration of information in a patient's file;
- alteration of office financial records;
- channeling monies outside (theft);
- absence without notification;
- use or possession of illegal drugs, alcohol or firearms;
- unauthorized communication of sensitive financial, patient or clinic information to third parties;
- inability to attend seminars or workshops (especially if given proper notice and time to

prepare for a seminar date); and

- letting another employee punch your time card for you.

The above paragraphs or sections are in alphabetical order, not their order of importance. A table of contents should be included at the beginning, listing each section or paragraph. There should also be a place for the new employee to "sign off," agreeing to the following: "I understand that Dr. Jones Chiropractic is an 'at-will' employer. I agree that I am employed for an indefinite duration so long as the employment is mutually satisfactory. Employment may be terminated at any time for any reason, with or without cause, and with or without notice, either by me or by Dr. Jones Chiropractic." "I have read and understand the rules and regulations at Dr. Jones Chiropractic. I have received and reviewed the manual and have my own copy to review as needed."

Section II - Employee Benefits

Chiropractic Benefits - Perhaps every employee is given free chiropractic care. Whatever your policy is for spouses or immediate relatives, getting free care should be stated as a benefit if you wish to give this benefit out. Setting limits in writing will be very helpful to you in the long run.

Earned Leave

If you have full-time employees or those working at least 32 hours per week, some states require that certain benefits be given. You need to know these facts and appropriately itemize them for the employees. "Earned leave" accrued is generally used for vacations and sick time.

Funeral Leave - how it is handled, and whether it is paid for or not.

Holidays - when they will and won't be paid, including holidays. Specifically address all major holidays when you are expected to be closed.

Jury Duty - whether they will or won't be paid for jury duty.

Office Telephone - when and what kind of personal calls are allowed to be made without reimbursing the office. Describe when and what kind of personal calls must be paid by staff (such as long-distance calls).

Seminar Attendance - This is promoted as an employee benefit rather than a rule or regulation. The ability to attend seminars at the doctor's expense to increase knowledge of the industry is a benefit to anyone interested in making chiropractic a career.

Staff Lounge or Lunch Area - If you have one, let the employee know where it is and what is available in it.

Supply Purchases - whether or not you allow employees to purchase supply items at cost from nutrition suppliers or vendors.

Don't forget to have a place for the new employee to sign agreement on this section of the manual as well, with the following: "I have read and understand the current policies regarding my benefits at Dr. Jones Chiropractic and have received a copy. I realize that office policies may change from time-to-time and my employer will give me any relevant changes in writing." I hope this gives you a starting point for writing your manual.

Having a manual on which employees "sign off" provides a good basis for your relationship with them. They know you have decided how you want your office to be run and that you have

communicated it to them. Having an employee jacket or file, with critical information (i.e., starting date, starting salary, notation of raises and when given, documenting absences, termination date) is also important, and most likely required by law in your state. Of course, existing employees should be given a copy of the new manual once it is written; I would recommend giving them two weeks to decide if they want to continue employment with the new rules, regulations and benefits.

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