

Appendix H:

Policy and procedure manual content template

The contents of an Employee Policy and Procedure Manual will depend on your type of practice. The list of topics can include (and may not be limited to) the following.

- Medical practice's mission, vision and values
- Administration
 - ↳ Personnel policies
- Hiring guidelines
- Job descriptions (list of job titles, roles and responsibilities)
- Termination guidelines
- Reporting guidelines
 - ↳ Salary
- Payroll procedures
- Salary grades and scale
 - ↳ Compensation (benefits, life insurance, etc.)
 - ↳ Laws and regulations
- Office hours (include guidelines on breaks)
- Overtime policy
- Public holidays
- Vacation time, sick leave, bereavement time
- Accessibility for Ontarians with Disabilities Act
- Office Management
 - ↳ Code of conduct (see Appendix VII)
 - ↳ Staff meetings
 - ↳ Conflict management
 - ↳ Workplace harassment policy
 - ↳ Social media policy (Internet, email, etc.)
 - ↳ Use of equipment for personal use
 - ↳ Training and development
 - ↳ Health and safety procedures
- Emergency Procedures
 - ↳ Emergency telephone numbers
 - ↳ Basic staff preparedness
 - ↳ Emergency in office (with and without a physician)
- Patient Management
 - ↳ Telephone procedures (preferred greetings, customer service tips, etc.)
 - ↳ Handling angry/violent patients
 - ↳ Patient privacy and confidentiality (leaving messages for patients, etc.)
 - ↳ Patient traffic flow procedures
 - ↳ Patient scheduling (appointment booking, cancellation procedures, etc.)
 - ↳ Medical records (filing, confidentiality, legal obligations, etc.)
- Billing
 - ↳ How to submit claims to OHIP and WSIB
 - ↳ How to reconcile Remittance Advice (RA) and Error Reports
 - ↳ How to bill and collect payment of non-insured services
 - ↳ Accounting procedures
- Clinical area procedures
- Laboratory services procedures
- Hospital privileges
- Office inventory and maintenance procedures