

# Procedure Manual Checklist

## Overview

- Mission Statement.
- Summary of Company's Purpose, Priorities and Goals.
- Code of Ethics.
- Scope of Practice Statement.
- Standards of Practice Statement.

## Business Management

- Confidentiality.
- HIPAA Guidelines and Forms.
- New Client Protocol.
- Fee Structure (Session, Packages, Sliding Fee, Free).
- Tipping.
- Payment Terms Available (Types, Insurance).
- Credit Card Acceptance (if so, which ones).
- Filing Insurance Forms.
- Safety Measures: OSHA requirements; Risk management; What to do in case of an emergency.
- Security.
- Care and Operation of Equipment.
- Cleaning and Maintenance.
- Hours of Operation.
- Procedures for Opening and Closing the Office.
- Desired Manner for Carrying out Routine Business Activities.
- Bookkeeping Instructions.

## Staffing

- Qualifications: general personality requirements, educational standards, work history.
- Job Descriptions.
- Chain of Command.
- Work Hours and Scheduling.
- Finances: salary, raises, overtime, pay day, leaves of absence, tardiness, sick leave, bonuses, benefits package, reviews.
- Continuing Education (requirements, what the company will pay for).
- Evaluations.
- Personnel Records.
- Grievance Procedures.
- Phone Use.
- Dress Code.
- Hygiene & Scent.
- Smoking.
- Parking.
- Employee Purchasing Procedures and Discounts (of services and products).
- Actions Requiring Discipline and Specific Consequences.
- Disciplinary Procedures.
- Grounds for Termination.
- Communications with Allied Health Practitioners.
- Competition.
- Customer Relations: how clients are to be greeted, the forms they need to fill out, financial arrangements, rescheduling, dispensing educational materials.