

Appendix G: Policy and procedure manual topics

The contents of an employee policy and procedure manual will depend on your type of practice. The list of topics can include (but not be limited to) the following.

All policies and procedures must abide by provincial laws.

Medical practice's mission, vision, and values

The mission statement focuses on what the organization does now, who they serve and how they serve them.

The vision statement focuses on the future and what the organization wants to become. It drives the companies' goals and objectives.

Values are what the organization's belief system and should align with the goals of the organization.

Organizational structure

The organizational structure describes what employees do, whom they report to, and how decisions are made.

Policies topics:

- Code of conduct - See Appendix H below
- Workplace violence & harassment policy - See OMA Template
- Confidentiality and privacy policy - CMPA Confidentiality Agreement Template
- Health and safety policy - Workplace Safety and Prevention Services Template or Ministry of Ontario Template,
- Accommodation policy (AODA) - HR Inclusive Toolkit (contains sample wording on page 11)
- Conflict of interest
- Hiring guidelines
- Job descriptions (list of job titles, roles and responsibilities)
- Reporting structure guidelines
- Salary grades and scale, compensation (benefits, life insurance, etc.)
- Performance review process
- Termination guidelines
- Hours of work (including guidelines on breaks, holidays)
- Overtime
- Leaves: vacation time, sick leave, bereavement, etc.
- Working from home
- Dress code
- Use of equipment for personal use
- Social media

H. Appendix

Office procedures

Procedure manuals should include the steps to complete a task, the role responsible for completing a task, and frequency of tasks.

Office Management

- Health and safety procedures - Template by: [Workplace Safety and Prevention Services](#)
- Emergency procedures - (Emergency telephone numbers, basic staff preparedness, emergency in office (with and without a physician etc.)) – Templates by: [Ottawa Public Health](#) or [IHSA](#)
- Office inventory procedures and maintenance procedures
- Payroll Procedures.

Patient management

- Patient communication - e.g., telephone, email and in person procedures (preferred greetings, how to call the patient (last name or first name), eye contact, etc.)
- Patient scheduling - e.g., appointment booking, cancellation procedures.
[See OMA online appointment webinar](#)
- Patient traffic flow procedures - [See OMA patient flow tips](#)
- Patient privacy and confidentiality - e.g., Leaving messages for patients, keeping information secure.
- Medical records - e.g., filing, confidentiality.
- Safe office procedures (aggressive behaviour/deescalating) -
[See OMA patient expectation webinar/resources.](#)
- Procedure for communicating with other healthcare providers, such as specialists/FD, laboratory/ diagnostic testing, allied health etc.- e.g., Following up with missing results, notifying patients about appointments.

Office Management

- How to submit claims to [OHIP](#) and [WSIB](#)
- [Track updates to OHIP billing](#)
- [How to reconcile remittance advice \(RA\) and error reports](#)
- [How to bill and collect payment of non-insured services](#)
- Accounting procedures

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