There are many benefits to a Policy and Procedure Manual for EMS services.

Whether your organization is working with full-time EMS employees, or part-time, or volunteers, there are many benefits to a Manual. Some of the benefits include avoiding discrimination difficulties. This is accomplished by policy in treating every person in a consistent manner, whether for hiring, discipline, termination, promotion, or raises and bonuses. Further, standard operational policies lead to positive morale of employees and volunteers because each person knows, in advance, what is expected of them. A well thought out Policy and Procedure Manual will pay for itself in a successful legal challenge – and most often will help you avoid a challenge.

Whether you call it a ‘handbook’ or a ‘policy manual’, the keys to a successful Policy and Procedure Manual, or Handbook, are:

1. Keep it up to date -- and date every page.

2. Make every member and manager responsible for every bit of information in the book which is not updated -- this includes administration!

3. Have every member and manager sign for his or her copy of the manual, and acknowledge that they have read and understand it, and have had the opportunity to ask questions and receive answers.

Reserve your management rights. Reserve the right to modify each and every aspect of your Manuals at any time without any notice. A sample statement may read as follows: “Management reserves the right in its discretion to modify any of the provisions of the Policy and Procedure Manual[s] at any time without any notice.”

Keep your Manual Flexible. Do not ‘lock’ yourself in when drafting policies or procedures. Flexibility is important in life. For example, an EMS organization may, by policy, state that EMT’s may only convey a patients to only two hospitals. But what happens if a physician on scene orders conveyance to a closer hospital? Is your service going to accept the liability for not following the conveyance order? Or, in a different example, what happens if you have no conveyance policy and a patient and his or her physician determines that you convey two counties away to a hospital? Should your policy state that you are an emergency service and therefore you will only convey to the nearest hospital – unless there is a clear physician order – subject to further determination by your medical director? Obviously your organization must adopt policies to serve as guidelines, but maintain flexibility.
Use your own language. You understand it and so will your employees and other 
readers. Avoid ‘legalize’ language. Your future readers may even include members of 
a jury and a judge. By using language foreign to you, you may even create more 
problems for your organization.

Do not make any provision in your Policy and Procedure Manual a binding contract. 
Avoid ‘contract-type’ language. For example, a statement that “once you have 
completed your probation period, we welcome you as a member”. Does this now 
clearly imply that you cannot terminate the employee or volunteer for any reason? 
Make sure that your Manuals are not Employment Contracts. At will employment 
means at will employment! In your Policy and Procedure Manuals, state in at least 
three prominent locations that your employees / volunteers are ‘at will’ employees / 
volunteers.

Avoid unwritten policies. For example, what if you state: “for a first offense, you will be 
given a verbal warning”. Who is going to argue four months later that a “verbal” warning 
was or was not given?

Make it clear that only the written provisions govern – no oral statements or previous 
practices which conflict with the written provisions have any effect.

You may have to establish different manuals for different purposes. By way of 
illustration, these are some manuals you may wish to consider:

1. Supervisory / Administrative Manual
2. Accounting Manual
3. EMS Procedures Manual
4. Incident Command Manual
5. HIPAA and Wisconsin Medical Privacy Procedures
11. Mutual Aid Responses Manual

Overall manual responsibility should be assigned to one key, trusted individual in your 
organization. Your Board should be the ultimate administration entity, but only one 
person should have responsibility. However, and I cannot stress this enough, that 
person’s responsibility is only to organize, edit [as to content and consistency] and 
approve. That person should delegate completely and democratically. For example, 
the person responsible [Jane] should delegate to the accounting/bookkeeper the 
procedures on accounting/bookkeeping. “Jane” should delegate the policies on 
disinfecting the ambulance after a run to a person who most often is assigned that task. 
The procedure on payroll should be assigned to the person who prepares the payroll. I 
suggest that if you have 35 members, then at least one policy or procedure should be,
at minimum, assigned to each person. In other words, there will be no person without at least one specific policy or procedure assigned to them. “Jane’s” responsibility is to assure that every person maintains his or her area of responsibility. And “Jane” is responsible to the Board. Note how this also ties the entire organization together! One objection is that “so-and-so” cannot be trusted. My response is to wonder why “so-and-so” is a part of your organization? Therefore, assign every person in your organization at least one section or page of the manual to be absolutely responsible for – from Board members to janitors.

Always indicate your ‘open door policy’, the fact that you are open to frank communication and discussion and will answer any questions regarding your Policy and Procedure Manual. If your organization is run by committee, then the committee members and meetings must have the ‘open door policy’.

Model policies and procedures are not always relevant [and may even be detrimental to your workplace]. It is worthwhile to study someone else’s policies and procedures, but always tailor them to your own situation[s]. Therefore, because policies and procedures must be periodically reviewed, it is much easier to review those policies and procedures which you drafted. It is difficult to review ‘off the shelf’ policies and procedures because, most often, they are foreign to you, both in content and in style.

Because periodic review is so important, follow the KISS principle: *Keep It Super Simple*.

If you follow these simple guidelines, you should have no difficulties in providing for straightforward directions to your volunteers and employees. Your goal is to set out in a clear and summarized manner your policies, procedures, rules, and active response protocols, all in various manuals for reference.

The goal of your EMS organization is to provide emergency services to your patients and to do so in a safe manner. Your manuals should provide clear and efficient operational guidelines to fulfill your mission. This includes the avoidance of conflicts between administration and the EMT’s – and between EMT’s!

Copyright Barry W. Szymanski