



BOH Organization Guide: #3 BOH Office

Board of Health and Local Health Department Standard Operating Procedures (SOP)

This **Checklist** highlights many of the steps needed today to organize a Massachusetts Board of Health.

The checklist is designed to be used in tandem with the **BOH SOP and Appendices**. BOXES CAN BE CHECKED WITH the CURSOR.

BOH Office

Office Area

- Restricted access, ideally lockable room in a public building.
- Contain, at a minimum, file cabinets, desk/table, computer with Internet access, telephone with voice mail.

Filing

- Sufficient file space to hold all files.
- Lockable drawer for any confidential information, including medical.
- Assign one File Clerk** to file all BOH documents.
 - All others should leave completed documents in **“To-Be-Filed” Box**.
 - Filing should be done regularly, preferably once a week, and no less than once per month.
 - All documents should be filed in accordance with established BOH procedures:
 - For residential files, file by Address or Map/Lot, not name.
 - File camp, food establishments, tobacco, and businesses by DBA name. Note on folder any owner changes.
 - Create separate files for each type of permit issued: Installers, Septage Haulers, Rubbish Haulers, Beach, Camps, Restaurants, etc.
 - Create an **Active File Box** or drawer for active files, such as housing, septic and well permits; organized by type of work and alphabetized by street name.
 - Create written procedures as to how files may be accessed by inspectors, BOH members and the public.
 - Public may have access only during BOH office hours or by appointment, at the discretion of the File Clerk. Public access must be in accordance with State Public Records Law.
 - Any files removed from the BOH office for any reason should be noted on a written list in the file cabinet.
 - Returned and completed files should only be filed by the designated File Clerk.

Paperwork and Files

- Assign one Clerical Clerk** to be responsible for all paperwork, fees & checking the mail. All BOH staff/members should know who this person is and how often mail/paperwork is opened.
- Create a **New Paperwork Box** for all new paperwork/mail which should be opened at least once a week.
- Do not accept applications or reports without the appropriate fees attached.
- Once opened, all paperwork should be logged in the **Weekly Log** and handled in one of the following manners:
 - Handled immediately and put into the To-Be-Filed Box.
 - Trashed/Recycled (logging not required for junk mail or solicitations).
 - Placed in one of the following files/boxes:
 - INBOX** for each Agent/Inspector/Staff; empty every week
 - Active File Box/Drawer** organize by name or address. Used for all files that are not complete/ready to file.
 - To-Be-Filed Box/Drawer** – completed items (all reports, letters, fees, etc. received); now Public Record.
 - BOH Meeting Folder** – documents to be considered or distributed to BOH members (may also be a computer file).
- Procedures for paying bills** and depositing checks should be determined with the treasurer/other town staff.
- Checks/Cash Fees:** complete a turn-over sheet and keep a copy with the Weekly Log. Fees should be deposited as soon as possible, at least once a week; not left in a file or in the BOH office.
- Note on appropriate Active File Checklist the name and amount received and for what.**
- Post all office procedures in an accessible location for anyone who may need them.
- Attach and maintain on the front of active folders an Active File Checklist so everyone knows current work status.

Telephone Messages and Emails

- Assign one Message Clerk** responsible for checking the BOH voice mail and BOH email.
 - All BOH staff/members should know who this person is and how often messages are checked.
 - Both voice mail and email can be checked remotely.

- Message Clerk has at least a basic understanding of the BOH’s work, and is able to answer simple questions, and understands how to direct messages to Health Agents, BOH members, and others such as building inspector, fire inspector, Town Clerk, etc.
- Forward important messages to the appropriate person immediately by email or cell phone.
- Forward less urgent messages via email to the appropriate person or leave in the person’s INBOX.
- Telephone:** all phone calls and messages should be logged as appropriate in the following:
 - Bound Complaint Log Book or Complaint Computer Log Program (all complaints).
 - Weekly Activity Log Sheet (all BOH actions and activities).
- Email**
 - Create a BOH generic email address for general BOH correspondence.
 - Consider creating BOH email addresses for all BOH members/staff as all BOH emails are public record subject to public review at any time.

- Public Access**
 - Town/City Hall**
 - Determine and post regular BOH office hours if applicable or “by appointment only” with the appropriate contact information. Ensure municipal staff know these hours.
 - Leave permit application forms and fee schedules on a table or a wall file organizer by the BOH office or with municipal staff to ensure easy public access.
 - Website**
 - Post all office hours and contact information on the municipal website.
 - Post BOH application forms and fee schedules online.
 - Consider accepting online or email applications.

- Best Practices**
 - Voice Mail Example:**

This is the ____ BOH office. If this is a life-threatening emergency, hang up and call 911. Office hours are ____, subject to change, so please call ahead. Messages are checked only on _____. If this is an urgent issue that can’t wait, call Town Hall Offices and leave a message for the BOH, stating why you need immediate help and your contact information.
 - Computer Virus Protection**
 - Use and update regularly a virus protection program like Norton (fee) or AVG (free).
 - Install operating system updates regularly.
 - Don’t follow unknown links.

- Office Tasks Assignments:** (Each of these tasks should have a specific person responsible. A person may be assigned more than one task.)
 - File Clerk**
 - Clerical Clerk**
 - Message Clerk**