Departing employee's name:

Departure date:

Supervisor's name:

Employee to be terminated: Yes □ No □

**DO NOT NOTIFY EMPLOYEE OF THIS LIST IF YES**

Person responsible for completing this checklist:

Date checklist initially reviewed:

Date all items completed:

Signature:

**1. RETURN PROPERTY:**

Returned N/A

Laptop □ □

Cell phone □ □

Tablet □ □

Camera □ □

External hard drives and USB sticks □ □

Security pass □ □

Building and office keys □ □

Desk, file cabinet or file room keys □ □

Credit cards, banking cards □ □

Dongles □ □

Calling cards □ □

Parking pass □ □

Business cards □ □

Personnel manual □ □

Client lists □ □

Petty cash advances □ □

Other office equipment (specify):

**2. CHANGE SECURITY ACCESS**

Disabled N/A

Entry/exit security alarm password □ □

**3. ARCHIVE OR DELETE ELECTRONIC DATA**

Archived Removed N/A

Laptop □ □ □

Desktop □ □ □

Tablet □ □ □

Cellphone □ □ □

[While email may be located in a laptop, desktop, or cloud, it deserves a category of its own. Email may need to be readily accessed to review the employee’s communications and work.]

Email □ □ □

**4. REMOVE ELECTRONIC ACCESS:**

DISABLE OR DELETE USER ID ON DEVICES

[Note the distinction between **deleting** and **disabling** user and login IDs and email accounts. Deleting IDs and accounts could result in the loss of data and other relevant information if there is to be an audit or forensic review of the departing employee's work. Disabling IDs and accounts will prevent access and help preserve relevant audit and forensic information.]

Disabled Deleted N/A

Laptops □ □ □

Desktops □ □ □

Tablets □ □ □

Cellphones □ □ □

DISABLE OR DELETE REMOTE/NETWORK ACCESS

Disabled Deleted N/A

Website remote access □ □ □

Dial-in remote access □ □ □

Virtual Private Networking (VPN) □ □ □

Email □ □ □

Network rights □ □ □

Teranet □ □ □

DISABLE OR DELETE CLOUD ACCESS

[The categories below are broad. We recommend replacing the categories with the name of the actual provider. For example, practice management software can include Clio, Amicus Attorney, etc. Email can include Gmail, Outlook, etc. Cloud storage can include Evernote, OneNote, DropBox, etc. Social networking can include company accounts for Twitter, Facebook, LinkedIn, etc. Add additional entries where there are multiple providers.]

Disabled Deleted N/A

Practice management software □ □ □

Email □ □ □

Cloud storage/File sharing □ □ □

Blogs □ □ □

Social networking □ □ □

Caselaw search engines □ □ □

**5. UPDATE EMAIL AND PHONE NOTIFICATIONS**

Auto-forward Auto-reply N/A

Email account □ □ □

Deleted Change N/A

Voicemail □ □ □

Deleted Change N/A

Internal voicemail directory □ □ □

**6. UPDATE LISTS**

EXTERNAL LISTS

Updated N/A

Phonebook advertisements □ □

Online advertisements □ □

Website (all references to employee) □ □

Social networking (all references) □ □

INTERNAL LISTS

Updated N/A

Staff and departments lists □ □

Letterhead □ □

Law firm brochures □ □

**7. ENSURE FILES ARE IN ORDER [DEPARTING LAWYERS]**

Done N/A

Return of all client files and documents □ □

Transfer memos for all matters □ □

Reports on unbilled time, account receivables □ □

Send notice letter to clients □ □

Reassign all files □ □

Obtain final time sheets □ □

Obtain remaining expense reports □ □

Review calendar and tickler systems

for pending deadlines and limitations □ □

**8. NOTIFY APPROPRIATE ENTITIES**

Notified N/A

Payroll provider □ □

Cancel benefits □ □

Notify banks □ □

Terminate signing authority □ □

Notify other service providers □ □

**9. WRAP IT UP**

Done N/A

Provide termination letter □ □

Provide record of employment □ □

Return personal property □ □

Conduct exit interview □ □

Notify staff of departure □ □

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