

Colorado Employee Termination/Resignation Checklist

When an employee resigns or is terminated, practitioners and firms need to act to prevent further access to confidential client information. Following are several steps that you or your firm may want to take to make sure that the exiting employee can no longer access files. In addition, clients should be notified of any change in staff assigned to their case as a matter of professional courtesy and to avoid any further client contact with the exiting employee.

- (1) Obtain possession of keys to the premises and file cabinets.
- (2) Ensure return of electronic devices and other firm property.
- (3) Change passwords.
- (4) Instruct the former employee about maintaining ongoing confidentiality, etc.
- (5) Inform the client of the lawyer or staff member's departure.
- (6) Transfer client matters from the lawyer leaving the firm to another lawyer in the firm.
- (7) List and file for future reference the business reasons for terminating a staff member.