# File transition-practitioner is leaving the firm

Act promptly - a principal or their delegate should manage the transition when someone leaves

Do not retain work if you do not have the expertise and capacity to do it.

This checklist is for client work only and not other employment issues like return of equipment.

|  |  |  |  |
| --- | --- | --- | --- |
| Action | Due Date | Done | Comment or detail |
| Request staff member leaving to:* fill out file handover list with details of all matters in their control
* close completed or dormant files
 |  | ❑ |  |
| Set a date and time to discuss the handover list |  | ❑ |  |
| Discuss work transfer with ongoing staff to establish their capacity to take additional work |  | ❑ |  |
| Consider short term support including contractors and barristers |  | ❑ |  |
| Meet with staff member leaving to review file handover list and discuss who will take over their matters |  | ❑ |  |
| Agree time with staff member as to when the file handover list action items will be completed. (handover memos and handover meetings) |  | ❑ |  |
| Check file handover list action items have been completed |  | ❑ |  |
| Check all passwords used by the staff member leaving for online work such as PEXA and courts have been handed over or changed |  | ❑ |  |
| If a client is leaving complete the [file transfer to another firm checklist](https://lplc.com.au/resources/checklists/file-transfer-to-another-firm) |  | ❑ |  |

Approval

**Title** **Date Signature**