

Information Technology: Sample Attorney Departure Checklist

Note: Be sure to start with a new copy of this document for each departure as updates to the form will occur.

Departing User / Office:	Position:	Transition Partner:
Departure Date:	Disable Date/Time:	Deletion Date:
HR Rep:	Assigned Technician:	Completed Date:

Section 1 - IT Manager or designee to complete first section

Tasks	Notes	Date	ASA	ASA Comments
1. Save this document into your standard content repository and assign security allowing full access to all involved parties.	Name document: Departure: <Lastname, Firstname> New versions for subsequent departures of the same person.	Date	Initials	
2. Verify account review parameters prior to deletion.	Enter name above in Supervisor field. This contact to be used for Step #13 below.	Date	Initials	
3. Determine if there is a need for active review of mailbox following departure.	Indicate name of reviewer in notes section. This contact to be used for Step # below.	Date	Initials	
4. Has extended access to VM/E-mail been granted, or use of out-of-office messages (requires approval)?	Indicate approver and duration in notes section. Standard verbiage is required and provided below.	Date	Initials	
5. Does user require assistance with creating backup of Contacts folder, or other personal data?		Date	Initials	
6. Is training assistance required to educate departing user on usage of any archival applications?		Date	Initials	
7. Inquire of departing user to determine if there are secured DMS documents which require security edits prior to departure.		Date	Initials	
8. Does departing user have all firm-issued computer equipment prepared for return?		Date	Initials	

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Tasks	Notes	Date	ASA	ASA Comments
9. Create an incident in helpdesk application and assign it to the individual responsible for completion of the checklist. Customer = departing user	Related incidents may be created if a requirement exists to track more than one assignee to complete the departure checklist. Record status in this document, as opposed to helpdesk application, but ensure ticket is closed at end of process.	Date	Initials	

Section 2 – Assigned Technician to Complete

Tasks	Notes	Date	ASA	ASA Comments
10. Check with IT Manager and/or others for possible exceptions to process.	Exceptions will be noted above in Section 1.	Date	Initials	
11. Send informational e-mail to Transition Partner, reviewers and others to inform them of the review and retention policies.	If supervisor unknown, send to HR rep. Note the response in comments section, along with date received (e.g. Response received from [Name]; [Date]; No review needed, I will review, or Not supervisor). Always "Cc" IT/HR Managers.	Date	Initials	
12. Capture/memorialize list of group memberships.		Date	Initials	
13. Determine if departing user is Business Owner or IT Contact of any security groups or other resources and notify IT Contact or IT Manager to arrange replacement.		Date	Initials	
14. Remove user from all ADS groups, except	Other application group specific	Date	Initials	

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Domain Users	memberships may be required based on transition administration need.			
15. Manage deletion/removal of Blackberry, ActiveSynch PDA account.	AD account may need to be enabled until this is completed.	Date	Initials	
DMS				
16. Check in all checked out documents.		Date	Initials	
17. Check in documents Authored, Entered, or Last Edited by departing user (checked-out by others):	You may not be able to disable the login or update security until all documents are checked in.	Date	Initials	
18. Contact DMS Administrators to perform special security or client/matter modifications to documents authored by departing individual.	Section 1 above will contain special security considerations.	Date	Initials	
19. Set DMS account to Virtual to inhibit editing of departed user's documents. Do not complete this until security changes from previous step are completed.	This protects the user from unauthorized access to secured documents should they return	Date	Initials	
Hardware		Date	Initials	
20. Reclaim departed users' computer, headset and other checked out equipment as appropriate.	Immediately notify IT Manager and HR rep if any equipment is missing.	Date	Initials	
21. Archive local data (including .PST files) to secure network location.	Typically, the retention period is consistent with review period unless noted by IT Manager instruction in section 1 above.	Date	Initials	
22. Identify data stored in shared directory or elsewhere. Copy to same secure location.	Create subfolders for each location where data is found.	Date	Initials	

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Tasks	Notes	Date	ASA	ASA Comments
23. Label laptop with user name and delete date and store in secured location.	Note in comments section the location where laptop is stored.	Date	Initials	
Telephony				
24. Change phone and intercom display per firm standard.		Date	Initials	
25. Remove DID instance from other phones.	Check secretarial assignments, etc.	Date	Initials	
26. Unsubscribe IP phone services (FastDials, Address Book, IPMA)	Call Manager only.	Date	Initials	
27. Delete Fast Dial URL	Call Manager only.	Date	Initials	
28. Remove the IPMA programming	Call Manager only.	Date	Initials	
29. Convert Call Manager User account to phantom number if needed. * <i>Phantom numbers are used in the event that extended voicemail access is provided to a departing individual.</i>	Check IT Manager instructions in section 1 above,	Date	Initials	
30. Delete the Call Manager User account	Do not delete until delete date if account converted to phantom number above.	Date	Initials	
31. Delete voicemail account from Unity.	Do not delete until delete date if account converted to phantom number above.	Date	Initials	
Exchange / AD				
32. Change login password	Check IT Manager instructions in section 1 above for possible extension.	Date	Initials	
33. Remove Outlook Delegate Permissions from others, as appropriate.	If none, enter 'n/a' in comments section	Date	Initials	

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34. Ensure all rules, server and local, are disabled.		Date	Initials	
35. Reassign Outlook Public Folder ownership permissions.		Date	Initials	
36. Delete any Send On Behalf or Forwarding Address assignments from Exchange General Tab, Delivery Options.				
37. On Exchange Advanced tab click on Mailbox Rights, select the name Self and allow Associated External Account privilege.	Check IT Manager instructions in section 1 above for possible extension.	Date	Initials	
38. Setup non-delivery notification	Check IT Manager instructions in section 1 above for possible extension.	Date	Initials	
39. Hide the Exchange mailbox.	Check IT Manager instructions in section 1 above for possible extension.	Date	Initials	
40. Disable user account in Active Directory.	Check IT Manager instructions in section 1 above for possible extension.	Date	Initials	
Misc Account Deletion and Administration		Date	Initials	
41. Delete desktop fax account				
42. Delete account in WebEx (if applicable).	Check IT Manager instructions in section 1 above for possible extension.	Date	Initials	

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Tasks	Notes	Date	ASA	ASA Comments
43. Delete teleconference card account.	Contact the helpdesk if assistance is needed to delete the account.	Date	Initials	
44. Tickle helpdesk ticket with due date for 30 calendar days in the future.		Date	Initials	
45. Create Outlook reminder entry for 30 calendar days later for completion tasks		Date	Initials	
Completion Tasks – 30 days post departure		Date	Initials	
46. Confirm with IT Manager that completion tasks can be performed				
47. Delete user's home and shared directory	If delayed, document exception in comments section.	Date	Initials	
48. Delete user's ADS network account and mailbox		Date	Initials	
49. Delete ADS computer account.		Date	Initials	
50. Uncheck 'Allow Logon' from the DMS User utility.		Date	Initials	
51. Delete archive directory.		Date	Initials	
52. Re-image departed user's laptop or desktop for future re-deployment.		Date	Initials	
53. Update 'Completed Date' at top of document and save.		Date	Initials	
54. Close helpdesk ticket.		Date	Initials	
55.		Date	Initials	
56.				

Standard Out of Office verbiage for VM.

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<Name> is no longer with the firm. For assistance, please press <extension of supervisor>. Thank you.

Standard Out of Office verbiage for email.

<Name> is not longer with the firm. For assistance, please contact <email address of supervisor>. Thank you.

Outlook form – Departure-Supv

Subject: Review of Electronic File for Employee Who is Departing

The IT Department received notification that <name> is departing the firm on <date>.

Network access for this individual is disabled at close of business on departure date.

Because you have direct supervisory responsibilities, or were otherwise assigned review responsibilities, you are being notified that network accounts and data specific to this individual and not otherwise stored in one of the firm's standard document systems (e.g. iManage, LegalKey, Introspect, Outlook Public Folders etc.) will be deleted from the system 30 days after departure.

Specifically, this includes Outlook e-mail not stored in Public Folders, data stored locally on the individual's firm computer, and data stored in shared network directories (e.g. H: drive). This will include all mail archives (.PST files).

Please reply to this note using buttons above which specify the following.

- No review needed - I am the designated supervisor for this person. No review of the data is needed.
- I will review - I am the designated supervisor for this person. I will need to review the data.
- Not supervisor - I am not the designated supervisor for this person.

If you request to review the data, we will contact you for follow up.

Thank you.

Outlook form – Departure-Qwest

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To Calling Card Vendor

Subject: Cancel Qwest Calling Card.

Please delete calling card for <departing user's name> at the <site> office, phone number <departing user's full phone number including area code>.

Thank you.