

# How To Protect Your Practice When An Employee Leaves

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PRACTICE MANAGEMENT

PERSONNEL

The need to protect your practice when an employee leaves has never been greater since employee resignations reached an all-time high of 4,000,000 in May. It's extremely difficult to safeguard your practice during this stressful process unless you've planned ahead. Here's a checklist of items you need to address:

1. **Reclaim company-owned records and property.** This includes keys, fobs, ID card, building pass, phone, tablet, laptop, and any other practice property, including a company credit card.
2. **Remove access to practice files and property.** Consider changing the locks, codes, pins, etc. to ensure the employee cannot gain physical entry. While you're at it, change the alarm code as well.
3. **Cancel subscriptions** that the employee had in their job role or transfer them to another employee.
4. **Revoke check writing and ordering authority.** Inform all vendors of this change.
5. **Disable user accounts.** If the employee had access to any third-party or internal accounts used for operations, remove their account and reset the passwords. If the employee had access to the practice's social media accounts, be sure to change the login credentials and transfer access to another employee.
6. **Terminate computer and VPN/remote-desktop access.** Change all computer and network or application logins and make sure the employee's access is removed if working remotely through a VPN. Contact your IT provider to ensure all other technology-related employee termination tasks are properly handled.
7. **Disable email and instant messaging accounts.** Make sure the employee's access to their email and any internal messaging platforms like Microsoft Teams is disabled. Then forward their incoming emails to another team member. Don't forget to remove their email address from all distribution lists.
8. **Disable phone and voicemail access.** If your practice uses apps the employee installed on their personal phone, make sure to update those accounts so that the employee no longer has access. Also, if you had calls set up to route to the employee's personal voicemail for "on-call" days or lunch hours, reset those as well.

9. **Back up the employee's hard drive.** Direct the employee not to delete information or factory reset their company-issued computers, phones, and laptops to preserve information and document any evidence of misuse. Consider updating your IT system so that data is automatically uploaded and stored on a cloud service as part of your standard back up routine.

10. **Conduct an exit interview.** Take the opportunity to make the best of this situation by learning valuable information to improve your practice. Ask these leading questions to generate honest feedback about why your employee is “actually” leaving and what you can do to prevent future turnover:

- What aspects of your new job do you feel your position here lacked?
- What did you like most about working here?
- What did you like least about working here?
- What do you think is fair compensation for the job duties you were performing?
- How would you rate our benefits package (insurance, PTO, etc.)?
- How could we improve the office's working conditions (i.e., supervision, morale, office policies, team relationship mediations, etc.)?
- How would you improve this position?
- How would you improve the office to make it a better place to work?

11. **Handle final payroll and benefit details.**

- Give the employee their final paycheck, including any unused PTO if that's your policy.
- Inform your insurance provider(s) of the employee's termination and end-date of benefit coverage.
- Notify the employee of their end-date of benefit coverage for health and dental insurance. Distribute COBRA or state law continuation coverage forms if they wish to continue health insurance coverage temporarily through your practice at their cost.
- If the employee is vested in your retirement plan, provide them with plan distribution information.
- Get an updated address for their final W-2 form.

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