FLUXLABS

CHECKLIST · LAW FIRMS

Protecting client confidentiality

Your duty to keep client information private covers email, phones and files too. A yearly check for every attorney and staff member.

Email and files

- [ ] Sensitive documents go out encrypted or through a secure sharing link, not as plain attachments
- [ ] Double-check the To line before sending. Autocomplete picks the wrong person
- [ ] Client files live on the firm's systems, not personal email or personal cloud accounts
- [ ] Shared links expire, and only go to the people who need them
- [ ] Wiring instructions are never changed by email, and clients are told so in writing

Devices

- [ ] Laptops and phones are encrypted and lock within a few minutes
- [ ] Lost or stolen devices are reported the same day so they can be wiped
- [ ] Personal phones that get firm email have a passcode and can be wiped remotely
- [ ] Old computers and copiers are wiped before they leave the building (copiers store scans too)

In the office and out

- [ ] Screens face away from the waiting area and windows
- [ ] Client conversations don't happen on speakerphone in public
- [ ] Printouts are collected right away and shredded when done
- [ ] Visitors and vendors are escorted, and sign in
- [ ] Two-step sign-in is on for email, document management and billing

Reviewed by _____

Date _____

