

What Good Looks Like — Transition Service Standards

Practical service standards to guide staff, managers, and trustees during an unplanned absence. Tailor to your practice or firm.

Phones & Scheduling

- Phones answered within __ minutes during business hours; voicemail returned within __ hours.
- Triage categories: Urgent (same day), Soon (72 hours), Routine (7–14 days).
- Clear rescheduling script; designate who approves schedule changes.
- After-hours coverage protocol documented with escalation path.

Communications & Notices

- Limited-purpose notices sent to patients/clients within __ hours (HIPAA/client-confidential compliant).
- Single source of truth for updates (website banner/auto-reply/portal message).
- Records request process shared in every notice; expected turnaround times stated.
- Media/social inquiries routed to designated spokesperson; no ad hoc statements.

Records & Privacy

- Records custodian (or successor counsel) designated; log all disclosures.
- EHR/DMS access verified; backups and exports tested.
- Secure channels used for PHI/client data; no personal email or devices.

Operations & Finance

- Payroll, rent, utilities, and critical vendors paid on schedule; signatory authority confirmed.
- Insurance maintained: disability overhead, malpractice/E&O, cyber; tail coverage steps noted.
- Vendor list current with account numbers; renewal/termination dates tracked.

Patient/Client Care & Files

- Urgent matters prioritized and reassigned within __ hours; document reassignment.
- Refills/stopgap services managed per protocol until handoff.
- File/matter status list generated: deadlines first, then active, then pending.

Escalation Map

- Operational issues → Manager → Trustee → Outside counsel/CPA as needed.
- Clinical/legal judgment calls → Qualified clinician/successor counsel.
- Reputation/PR issues → Designated spokesperson → Trustee.

Success Metrics (Define “Good”)

- % of urgent calls handled same day: target __%.
- Payroll and critical vendor payments on time: target 100%.
- Records requests fulfilled within __ business days: target __%.
- No unauthorized disclosures; zero use of personal channels.

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