

A SOLO & SMALL FIRM'S GUIDE TO PREPARING FOR TIME AWAY



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Solo practitioners and small firms face unique challenges when stepping away from their practices, whether for a planned vacation, medical leave, family emergency, or other unexpected absence. Unlike larger firms, solo and small firms often have limited internal resources to ensure client matters continue to be handled seamlessly.

Thoughtful advance planning is essential not only to protect clients' interests and meet professional obligations, but also to reduce stress and disruption to the practice. The following recommendations highlight practical steps Michigan solo practitioners and small firms can take to prepare for both planned and unplanned absences, while complying with the State Bar of Michigan's interim administrator program requirements and promoting continuity of client service.

BEFORE A PLANNED VACATION

BUILD A RECIPROCAL COVERAGE RELATIONSHIP

- Develop a relationship with another attorney in your area who can handle emergencies, court appearances, or urgent client issues while you are away and discuss with each client in advance whether the client consents to another attorney handling the matter if an emergency arises during your absence.
- Many solos and small firms create reciprocal "vacation coverage" arrangements where each attorney covers for the other when needed.

CALENDAR MANAGEMENT WELL IN ADVANCE

- Avoid scheduling hearings, closings, or critical deadlines during your absence.
- Request adjournments or continuances early when necessary.
- Review every active file 30-60 days before departure and identify deadlines that could arise while you are gone.

NOTIFY CLIENTS APPROPRIATELY

- Inform clients with active matters that you will be unavailable.¹
- Provide an automated "out-of-office" email response that clearly states the dates the attorney will be unavailable, whether the attorney will be monitoring email or voicemail during that time, and who clients should contact if they have an urgent matter. If another attorney will be monitoring urgent matters, provide that attorney's contact information and instructions for reaching them.
- Set realistic expectations about response times.

¹ Please visit the Practice Management Resource Center [Forms](#) site for available templates.

CREATE AN “ABSENCE BINDER” OR DIGITAL DASHBOARD

- Maintain:
 - Upcoming deadlines
 - Court dates
 - Client contact information
 - Trust account information
 - Key passwords and system access procedures
 - Emergency instructions for staff, if applicable
- This preparation also serves your broader succession planning obligations under the interim administrator program.

FOR UNEXPECTED ILLNESS, DISABILITY, OR EMERGENCIES

Michigan now requires private practice attorneys to designate:

- An Interim Administrator or enroll in the State Bar of Michigan’s Interim Administrator Program, and
- A Person with Knowledge of the practice.

The person with knowledge should know:

- Where files are located
- How to access calendars
- How to locate passwords and records
- What urgent matters are pending

Visit michbar.org/Rule21 for more information.

TECHNOLOGY PRACTICES THAT HELP

A solo and small firm practice becomes much easier to cover when:

- Client files are available electronically through a secure, cloud-based system if they will be accessed while traveling.
 - Maintain client confidentiality and protect client information when working remotely, including avoiding public or unsecured Wi-Fi and using secure networks, devices, and connections to access or transmit client information.
- Calendaring is centralized.
- Client communication systems are documented.
- Staff know escalation procedures.
- Trust-account procedures are written and accessible to authorized personnel.

RISK MANAGEMENT CHECKLIST

Before leaving for any extended absence:

- Review all deadlines for the next 60 days.
- Arrange backup attorney coverage.
- Inform active clients when appropriate.
- Update out-of-office messages.
- Confirm staff know emergency procedures.
- Ensure your Rule 21 interim administrator information is current.
- Verify your Person with Knowledge can access necessary records.
- Document trust-account status and pending disbursements.

WRAP-UP

Even if you have already complied with [Rule 21](#), consider going beyond the minimum requirement. The State Bar of Michigan recommends maintaining a comprehensive succession plan, organized files, contact lists, and clear instructions for an interim administrator so clients are protected if you become temporarily or permanently unable to practice.

For a solo practitioner or a small firm, the most effective combination is:

- A trusted backup attorney,
- A documented Rule 21 succession plan,
- Cloud-based practice management, and
- Advance calendaring to eliminate avoidable emergencies.

For additional assistance, please contact the State Bar of Michigan's Practice Management Resource Center at (800) 341-9715 or email pmrchelp@michbar.org.