

CLINICAL PROGRAMS CASE CLOSING MEMORANDUM
(Must be Signed by Student and Supervising Attorney – PLACE ORIGINAL IN FILE)

TO:	[Supervisor]
FROM:	[Student Attorney]
CLOSING DATE:	[Date Submitted to Supervising Attorney/Faculty]
CLINIC/PRACTICE AREA:	
APPROVED BY	[Name of Supervising Attorney/Faculty]

CASE INFORMATION

Client's Full Name (First, Middle, Last):	Clio Case Number:
Student Attorney(s)	Intake Date:
Supervising Attorney/Faculty:	Court/Agency:
Court/Agency Docket #:	Judge/ALJ:
Referral Source:	Clinic-Specific Case Type:
Scope of Representation:	Clinic-Specific Disposition:
Monetary Award/ Settlement/ Value of Relief:	Hours Worked on Case (approximate):
List of People entered into Clio (At minimum Client and Opposing Party):	

CLIENT'S OBJECTIVES: Brief description of issue(s) and client's goal(s).

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WORK DONE: Summary or work done by Clinic on Case:

CASE OUTCOMES: Brief description of the outcomes & extent to which client goals were met:

Any ongoing or unresolved issues? ☐ Yes ☐ No
If, Yes, Describe:

Is our office assisting with ongoing/unresolved issues? ☐ Yes ☐ No
If, Yes, Describe:

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CASE FILE CLOSING CHECKLIST

Use "X" if completed:

- ☐ All necessary court/administrative orders entered into Clio & paper file.
- ☐ Notice of motion to withdraw/substitution of counsel filed, served, & in Clio/ paper file (if applicable).
- ☐ Remaining or outstanding trust fund money returned to client (if applicable).
- ☐ Original documents returned to client.
- ☐ Extra copies and extraneous materials removed from file and shredded (if contain client information).
- ☐ Copy of closing memo in file and Clio.
- ☐ New law, useful memos/research and/or sample pleadings, etc., redacted and saved on shared drive or in Clio template matter (if applicable).
- ☐ All clients, opposing parties, attorneys, witnesses, experts, etc. entered as Contacts in Clio.
- ☐ All case-related documents, pleadings, notes, memos, etc. are in paper file and scanned/saved in Clio.
- ☐ All case activity notes and time entries are documented in Clio.
- ☐ Closing letter sent to client.
- ☐ No confidential case-related information or documents are in your non-clinic email, on personal devices, on laptops or other personal computers.