

Separation of Employment Checklist

Name: _____

Item	Action	Done?	Date
Resignation Letter	Employee provides you with this. File in personnel File.		
Involuntary Termination?	If the employee is being fired or not having their contract renewed (schools), you must contact HR prior to action.		
Separation Letter	You Send to Employee, copy in personnel file <ul style="list-style-type: none"> • Include <ul style="list-style-type: none"> ○ Notice of Conversion/Portability Form ○ Portability Rate Table and Facts Form 		
Payroll Change Form	Note Termination Date, file in personnel file		
Vacation Pay Out	Calculate final (current) pay period's accrual. Add with the current balance, and pay out on final paycheck. Change accrual code in IOI to EX.		
Terminate Employee in IOI Payroll	*If the employee is transferring to another location in the diocese STOP HERE and contact Diocesan HR to coordinate.		
Terminate Benefits	All Benefits (Medical, Dental, Vision, Life, LTD) will be terminated by the online benefits system (HR3) once you Terminate in PrimePay . Do not report to carriers individually.		
Medical Insurance Continuation (similar to COBRA)	If employee expresses interest in continuing medical coverage, coordinate with Diocesan HR.		
Final Check	If terminating near the end of the month and final check will fall in another month, coordinate with diocesan HR to stop insurance charges on final check.		
Final Check (Teachers)	If a teacher is leaving mid school year, you must calculate the remaining balance on the contract due to the mismatch between time worked and pay earned for teachers and pay out the additional funds earned but not yet paid on the final check. Contact HR for assistance.		
I-9 Form	Move from active employee I-9 to terminated employee I-9 folder.		
Exit Interview	If conducted, file.		
Remove employee from Websites	Remove the employee from your webpage		
Terminate IT access	Revoke access to Payroll, accounting, and other secure systems.		
Collect Keys, Phones, other property			
DIOCESE USE ONLY	Add to Terminated Employee Database, update screening database, Remove Employee from Telephone Emergency Alert System		

Notes _____
