

NON-PAS LOCATION

Separation of Employment Checklist

Employee Name and Title: _____

Department: _____

Reason for Separation: Termination _____ **Resignation:** _____

Item	Action	Assigned to	Done/Date
Review Employment Agreement	<ul style="list-style-type: none"> • Check notice periods, severance terms, and post-employment obligations • Confirm Termination or Resignation letter is filed in employee file. • Confirm NDA and Conflict forms are signed. 		
Formal Exit Documentation Packet for Employee	<p><u>Prepare the following:</u></p> <ul style="list-style-type: none"> • Separation of Employment/Benefits Information letter • Notice of Conversion and/or Portability Rights • Portability Rate Table & Facts • Medical Insurance Extension Instructions and Form 		
Conduct Exit Interview	<ul style="list-style-type: none"> • Exit Interview Questions (file in personnel file) • Present Exit Documentation Packet to Employee (Inform employee that all benefits will be terminated per the packet information; however, if you wish to continue medical coverage, contact Haley Ball hball@charlestandiocese.org) • Have employee sign Payroll Change Form • Have supervisor sign Payroll Change form after exit interview and place fully executed form in personnel file. <p><u>Confirm Legal and compliance:</u></p> <ul style="list-style-type: none"> • Confirm NDA and conflicts are signed and contained in personnel file. 		

Transfer of Knowledge	<ul style="list-style-type: none"> • Confirm receipt of hard files and documents • Arrange handover of ongoing projects to employee on team • Discuss any document critical information and processes 	Supervisor	
Retrieve Company Property	<ul style="list-style-type: none"> • Laptop, power charger, cell phone, access card, credit card, keys, etc. 		
Notify IT to Revoke Access	<ul style="list-style-type: none"> • <u>Inform IT of termination</u> and request that authentication needs to be revoked and password changed to ensure the terminated employee can no longer access it. • Remove the employee's license to prevent them from accessing their account. • Convert the terminated employee's mailbox to a shared mailbox. This retains the calendar and email contents while removing the need for a license. • Grant access to the shared mailbox (including the calendar) to appropriate team member(s) who need to manage the calendar. • Set up email forwarding to redirect any new emails to another employee or department. • Remove user from distribution lists and groups. • Change security codes if necessary. 		
Payroll Change Form	<ul style="list-style-type: none"> • Note termination date and reason • File in personnel file 		
Update Employee Record and calculate compensation/vacation payout	<ul style="list-style-type: none"> • Mark as "terminated" in ADP system • Move from active employee I-9 to terminated employee I-9 folder. • Calculate final (current pay period's accrual. Add with the current balance, and pay out on final paycheck. Change accrual code in ADP. • Final pay processing 		

Terminate Benefits	<ul style="list-style-type: none"> • All Benefits (Medical, Dental, Vision, Life, LTD) will be terminated by the online benefits system (HR3) once you Terminate in ADP. Do not report to carriers individually. 	Haley Ball, HR	
Medical Insurance Continuation	<ul style="list-style-type: none"> • If employee expresses interest in continuing medical coverage 	Haley Ball, HR	
Notify Relevant Departments	<ul style="list-style-type: none"> • Facilities - for office space management, remove from telephone emergency alert system. • Communication - for removal of employee from webpage. Send flocknote to relevant team member re employee's departure, update organizational chart. • Child Safety – add to terminated employee database, update screening database. • Note in Virtus if the employee can be rehired. 		