



# Employee Separation Checklist

Completed by Supervisor

<b>Employee Name</b>	<b>Location / Program</b>	<b>Term Date</b>
<b>Supervisor Name</b>	<b>Reason for leaving:</b>	

*If voluntarily released from service*

- Resignation/Retirement letter submitted to Supervisor with appropriate notice

*If involuntarily released from service*

- Documentation of reason for release (i.e. Elimination of Position, Reduction of Staff due to loss of Funding, etc.)
- Documentation of performance issues and disciplinary action is in employee file
- Security Notified for exit meeting, as appropriate

### Prior to last day of employment

**Office Administrator**

- Schedule exit interview (*If Voluntary*)
- Prepare Benefit Cancellation Form  
*(benefits effective through end of month following separation)*
- Final Expense Reports Submitted.

**Accounting/Finance**

- Prepare 12 Mo. Continuation Letter
- Final paycheck is being prepared.
- Check final balances on credit card/cancel
- Pay out accrued leave.
- Final Expense Reports paid.

**Office Coordinator/Facilities**

- Cancel **voicemail** account effective employee's last day.
- Request to have employee's **network access** closed effective employee's last day.

### On last day of employment

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| <ul style="list-style-type: none"> <li><input type="checkbox"/> Provide Continuation letter &amp; explain</li> <li><input type="checkbox"/> Last paycheck (please check one) <ul style="list-style-type: none"> <li><input type="checkbox"/> Provided at exit interview OR</li> <li><input type="checkbox"/> Mailed after termination date</li> </ul> </li> <li><input type="checkbox"/> Provide 401 (k) Contact Info<br/><i>cannot access funds until 2 - 4 weeks</i><br/><i>Record must be termed in IOI</i></li> <li><input type="checkbox"/> Address Changes Verified</li> <li><input type="checkbox"/> Collect or verify computer system(s) or equipment</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Collect security card/name tag/keys</li> <li><input type="checkbox"/> Collect archdiocesan cell phone</li> <li><input type="checkbox"/> Collect phone card</li> <li><input type="checkbox"/> Collect credit card<br/><i>[Complete 'Receipt of Property' form]</i></li> <li><input type="checkbox"/> Have email closed/forwarded</li> <li><input type="checkbox"/> Exit Interview Discussion</li> <li><input type="checkbox"/> Departure is communicated to staff</li> <li><input type="checkbox"/> Eligible for rehire? <input type="checkbox"/> Yes <input type="checkbox"/> No</li> <li><input type="checkbox"/> Terminate status in the IOI system</li> </ul> |
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### After last day of employment

- Check for any additional amounts owed for equipment, health coverage, etc.
- Mail final pay stub to former employee if necessary.
- Track payments if former employee submits a request for Continue Health coverage
- Complete and submit benefit forms to stop coverage for Dental, Vision
- Cancel Health coverage if no election to continue, or for non-payment

Employee: \_\_\_\_\_ Office: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor / Site Administrator: \_\_\_\_\_ Date: \_\_\_\_\_