

## Employment Termination Checklist (Schools)– 2019

Employee Name: \_\_\_\_\_

Date: \_\_\_\_\_ Date of Termination: \_\_\_\_\_

### Notification

\_\_\_\_\_ **Official Notice:** If an employee tells you of their intention to leave your employment, ask them to write a resignation letter that states they are leaving and their termination date. (Request a minimum of two week's notice, when possible and desirable.)

### Permissions / Access Termination

\_\_\_\_\_ **Notify Your Network Administrator:** As soon as you know that an employee is leaving, notify your Network Administrator or other appropriate staff person of the date and time on which to terminate the employee's access to computer and telephone systems. All personal files should be removed from the computer by the employee before their termination date. Arrange for access to office files on employee's computer.

\_\_\_\_\_ **Disable employee building or property access:** Effective on the termination date, whether immediate in a firing situation, or at a mutually agreed upon end date, you need to terminate the employee's building access. Depending on your access methods, you will need to disable the employee's building entry code, disable the entry swipe card, or collect the employee's keys. It is in both your best interest and the former employee's that he or she cannot access any company property.

### Return of Property

\_\_\_\_\_ **Return of company property:** Exiting employees are required to turn in all company books and materials, keys, ID badges, computers, cell phones and any other company-owned items.

\_\_\_\_\_ **Passwords:** Employees should provide their supervisors with passwords and other information pertaining to accessing computer files and telephone messages. (You may want to keep email and phone accounts active for awhile to field customer contacts.)

### Status of Benefits

\_\_\_\_\_ **Vacation pay and unused sick time:** Terminating employees are paid out unused, accrued vacation or personal leave on their final paycheck. We do not pay out unused sick leave.

\_\_\_\_\_ **Benefits status:** Following termination, employees must be informed of the status of their benefits upon termination. This includes life insurance, health/dental/vision coverage, and retirement plan. (In the United States, organizations comply with the Consolidated Omnibus Budget Reconciliation Act of 1980 (COBRA), and extend to eligible employees and their enrolled dependents the right to continue health/dental/vision plan coverage for a specified period of time at their own expense and at full cost. This is sent to employees by the insurance companies.)

1. Health/Dental/Vision – extends to the end of the month of termination, unless it is during the summer months. If they are paid out the summer months checks, they term at the end of the

month. If not, they term at the end of the month for the last payment of their final check. COBRA will be sent by the insurance companies.

2. Flexible Spending Accounts and Dependent Flex – If an employee terminates and there is unspent money in their account, it should be paid out to the employee. This must be taxed as salary.
3. Life insurance can be ported, meaning the employee can take it with them. UNUM portability forms should be given to the employee. They can port 1.5 times their annual salary.
4. The 403b plan can be handled through the Northwest Plan Services. For any changes, the employee should contact them directly. Phone: (206)588-4561.

\_\_\_\_\_ **Repayment of advances:** Any unpaid payroll advances will be subtracted from the employee's final check.

\_\_\_\_\_ **Payment of money owed the employee:** Any unpaid expenses for company business purposes (turned in on an expense report), unpaid commission and bonuses will be paid in the final pay check.

### **Confidentiality and Non-compete Agreements**

\_\_\_\_\_ **Review of confidentiality agreement:** Any confidentiality agreement or non-compete agreement that the exiting employee signed when commencing employment should be reviewed to make certain the employee understands what is expected.

### **Exit Interview**

\_\_\_\_\_ **Confidential exit interview:** Exiting employees are encouraged to participate in a confidential exit interview. (Exit interviews are an important process for gathering information regarding the working environment. When notified that an employee is terminating employment, schedule an exit interview. All information gathered is confidential and should be used to improve business processes. (sample attached)

\_\_\_\_\_ **Grievance Policy:** Exiting employees should have a copy of the grievance policy, whether they are terminating voluntarily or not. This includes retirement. Signature of receipt should be signed below.

\_\_\_\_\_ **Have the employee update their address.** Especially to alleviate location issues during tax season as W-2s will come back as non-deliverable if the address has changed. Without new contact information, it is difficult to provide needed information to the former employee. As a backup, verify that the employee's emergency contact information is up-to-date and that you can contact that person to locate them if you have trouble getting their W2s to them.

### **Follow-up**

\_\_\_\_\_ **Terminate all benefits in the Benefit Allocation System (BAS)** Please do this immediately to avoid sending unnecessary benefit payments for terminated employees and so that benefit companies can get COBRA information to employees in a timely manner.

I, \_\_\_\_\_, **(employee signature)**  
**have received a copy of the Diocesan Grievance Policy.**

\_\_\_\_\_ **Date**