

Separation from Employment Checklist

All employees and former employees are treated with dignity and respect. All questions regarding a current or former employee are referred to HR. Information about a current or former employee is never provided to a caller or visitor.

Employee's Name _____ Position Held: _____ Location: _____

Departure Date: _____ Personal mailing address: _____

Personal email address: _____ Phone number: _____

Collected Items from Employee	Returned		N/A
	Yes	No	
Resignation Letter (Not applicable for involuntary termination)			X
Keys: Building Cabinets Other:			
Photo ID Badge			
Laptop			
Cell Phone			
Check with IT to determine if this employee has access to the Archdiocese email account from personal cell phone. HR can guide the employee on how to delete access from a personal cell phone follow the below: iPHONE – Settings\Passwords & Accounts\<archsa/exchange account>\Delete Account ANDROID – Applications\Email\Settings\Accounts\PRESS AND HOLD EXCHANGE ACCOUNT\Remove Account			
Credit cards			
Business cards			
Parking Permit			
Checked for professional development / training agreement - REIMBURSEMENT			

Item or Information provided to Employee	Employee's Initial
Termination Letter (For-cause termination – Not applicable if it is a voluntary termination)	
COBRA – Will receive packet to home address after employment separation has been processed.	
Accrued Vacation leave: _____ If there is a Ministry Agreement with one of the Catholic Schools, the employee is not paid for PTO leave.	
401(a) Pension Plan and 403(b) Retirement Plan – Please refer to attached Archdiocese of San Antonio Pension Plan Overview flyer.	
Company procedure for providing employment reference: Provide only start date, end date, and title.	
Termination of health benefits (MDCL, VSN, DNLT) takes place on the last day of the termination month : _____. STD and LTD terminate on the employment termination date. ____Additional deductions need to be made on last check ____No deductions needed on last check ____N/A	
Date of final paycheck will be:	

Employee Signature

Date

HR Representative or designee (print)

Signature

Date

**FOR HUMAN RESOURCES OFFICE USE ONLY
(if applicable)**

As per management, last day of work for the employee: _____ Departure time: _____

Voluntary employment termination: _____ Involuntary employment separation: _____ Eligible for re-hire: Yes or No
(If No, be sure to include copies of documented discussions, verbal/written warning, termination etc. with the Paylocity Status Change Form your bookkeeper will process)

Proper notice given? Yes No (Non-exempt – 2 week notice; Exempt or as noted by policy – 4 week notice)

HR sends invite to employee for Exit Interview (Refer to sample email - includes Exit Interview Questionnaire).

Arrangements for collecting personal belongings. Will boxes be needed? What is the best time of day?

Date HR sent Exit Survey: _____ Via: Email Hand delivered Mail

Item (if not applicable, denote with N/A)	HR returns item to or informs Department	Department Representative (print name)	Initials/Date or Date of Email	HR Representative (print name)	Initials/Date
Keys ___ Building ___ Office ___ Cabinet s Other					
Laptop					
Cell phone					
Credit cards					
Disable computer and systems access					
Disable their specific alarm code					
Disabled voicemail					
Remove from Website or SharePoint					
Removed from distribution lists					
Disable e-mail					
As per supervisor, all emails are to be forwarded to (print name):					
HR sends email or submits notice to Payroll regarding final paycheck	Payroll				
All termination documents are filled in personnel file and the personnel file is removed from active to former employee cabinets.					

