|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Employee Name:** |  | **Manager:** |  | | |
| **Department:** |  | **Location:** |  | **Term Type:** |  |
| **Term Date:** |  | **Last Workday:** |  | **Final Pay Day:** |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **PEOPLE OPERATIONS TASKS** | **DUE DATE** | **COMPLETED DATE** | **INITIALS** |
| File resignation letter/email, for voluntary term |  |  |  |
| Conduct exit interview, for voluntary term |  |  |  |
| Manager notified |  |  |  |
| Earned time-off calculated for final check, if applicable |  |  |  |
| EE contact info verified |  |  |  |
| Direct Deposit EE Authorization Signed |  |  |  |
| EE Authorization Signed for Employment Verifications |  |  |  |
| Company Asset List Provided to EE |  |  |  |
| EE notified of outstanding monies owed |  |  |  |
| Final paycheck deductions calculated |  |  |  |
| Signed NDA and Confidentiality Agreement provided to EE |  |  |  |
| Employment Severance Letter provided to EE |  |  |  |
| Unemployment documents provided to EE |  |  |  |
| COBRA notifications processed |  |  |  |
| Retirement plan information provided to EE |  |  |  |
| HSA/FSA account information provided to EE |  |  |  |
| Final paystub reviewed with and signed by EE |  |  |  |
| All assets collected (e.g., phone, key cards, credit cards) |  |  |  |
| Update HRIS record with term info and inactivate |  |  |  |
| Move EE file to inactive folder |  |  |  |
| **FINANCE/PAYROLL TASKS** | **DUE DATE** | **COMPLETED DATE** | **INITIALS** |
| Credit card inactivated |  |  |  |
| Final check processed and delivered |  |  |  |
| Inactive in payroll system |  |  |  |
| **IT TASKS** | **DUE DATE** | **COMPLETED DATE** | **INITIALS** |
| Deactivate from all company systems, apps, and websites |  |  |  |
| Prep equipment for new employee |  |  |  |
| Remove from company email server |  |  |  |
| Remove from company email distributions |  |  |  |
| Set up e-mail forwarding to manager |  |  |  |
| Set up call forwarding to manager |  |  |  |
| Disable voicemail |  |  |  |
| **FACILITIES TASK** | **DUE DATE** | **COMPLETED DATE** | **INITIALS** |
| Deactivate all key cards and building access codes |  |  |  |
| **MANAGER TASKS** | **DUE DATE** | **COMPLETED DATE** | **INITIALS** |
| Inform team and impacted colleagues of departure |  |  |  |
| Inform partners, vendors, and/or clients for change |  |  |  |
| Open replacement requisition |  |  |  |
| Clean workspace for new employee |  |  |  |
| Connect with EE on LinkedIn, if applicable |  |  |  |