**Ending Employment checklist**

[INSERT ORGANIZATION LOGO HERE]

|  |  |  |  |
| --- | --- | --- | --- |
| Employee Name |  | Date |  |

**Supervisor**

[ ]  **Communication**

[ ]  Notify staff and management with an internal notification of termination (be mindful of potential sensitivity around timing and method)

**HR Department**

[ ]  **Exit Interview**

[ ]  Schedule a face-to-face exit interview and/or online survey for the employee to complete before their final week of work, if possible

[ ]  **Benefits (HR/Finance)**

[ ]  Reconcile taxable benefits and process any necessary adjustments on final pay

[ ]  Reconcile employee-paid benefits deductions and process any adjustments on final pay

[ ]  Cancel or continue benefits until last day of employment

[ ]  Provide employee with information on options to convert any benefits to an individual plan

[ ]  Notify pension department/administrator regarding Pension Plan/Group RRSP

[ ]  Check paid time off (PTO) balance; inform employee of any remaining PTO and how it will be processed at termination of employment

[ ]  **Contracts/Legal**

[ ]  Provide letter reminding employee of any legal obligations that continue post-employment (such as confidentiality agreement/employment contracts)

[ ]  **Records**

[ ]  Pull personnel file to be stored with terminated employee files

[ ]  Advise employee to provide any changes to current address for year-end purposes (T4, RL-1, etc.) by phone or email

[ ]  Prepare Record of Employment (ROE) and submit electronically within legislated time frame

**Payroll**

[ ]  **Compensation**

[ ]  Notify payroll department to process final paycheque

[ ]  Inform payroll of any unused but earned PTO amounts due to employee

[ ]  Notify payroll to process severance pay and whether lump sum or salary continuation (if applicable)

**Administration**

[ ]  **Information Technology**

[ ]  Disable email account

[ ]  Disable internal communication accounts

[ ]  Remove employee’s name from email group distribution lists; internal office phone list; website and building directories

[ ]  Disable computer access

[ ]  Disable phone extension

[ ]  Disable voicemail

[ ]  **Facilities/Office Manager**

[ ]  Disable security codes

[ ]  Change office mailbox

[ ]  Clean work area and remove personal belongings

[ ]  **Additional Arrangements and Notes**

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| --- | --- | --- | --- |
| Signature(Supervisor) |  | Date |  |