**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 |  |